



# ScholarShare College Savings Plan Additional Contribution Form

**Questions?** Call toll-free 1.800.544.5248

Or write to the Plan at P.O. Box 219185 Kansas City, MO 64121-9185

Visit [www.ScholarShare529.com](http://www.ScholarShare529.com)

## Instructions

- Use this *Additional Contribution by Mail* form only to contribute to an existing Plan Account. (You must complete an *Account Application* to open an Account for another Participant and/or Beneficiary.)
- Print in capital letters using blue or black ink. Mail this form to the Plan at the above address, along with your contribution check(s).

## 1 Account Information (Refer to your Account statement.)

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Plan Account Number (Please complete one form for each Account)

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Telephone Number

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Participant or Custodian Name (First, MI, Last, Suffix), or Entity Name

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Beneficiary Name (First, MI, Last, Suffix)

## 2 Contribution Check Information

**Make checks payable to, or appropriately endorse to, the *ScholarShare College Savings Plan*.**

Contributions are permitted by personal checks, bank drafts, teller's checks and checks issued by a financial institution or brokerage account payable to the Participant and endorsed to the Plan by the Participant, and third-party personal checks up to \$10,000 endorsed to the Plan by the Participant. Checks must be drawn on a U.S. banking institution and must be payable in U.S. dollars. Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts in the Network for the same Beneficiary to exceed the Maximum Contribution Limit. Please refer to the *Disclosure Booklet* for more information.

**A note about Uniform Gift to Minors/Uniform Transfers to Minors Accounts (UGMA/UTMA):**

If your contribution check represents proceeds from an UGMA/UTMA account, those funds can only be deposited into another UGMA/UTMA account for the same Beneficiary, subject to applicable law governing such accounts.

**Check**

Indicate the amount of your contribution into the selected Investment Portfolio(s) below and enclose your contribution check(s), payable to the *ScholarShare College Savings Plan*, along with this *Additional Contribution Form*.

**Indirect Rollover**

To rollover the proceeds from the redemption of another Qualified Tuition Plan account (QTP), indicate the amount you are contributing into the Investment Portfolios in Section 3, and submit a check for the amount along with this form. The check must be received by the Plan within 60 days of the date of the withdrawal from the other qualified tuition program or Coverdell ESA to qualify for rollover treatment. *Provide the breakdown of cost basis and earnings in the box below and submit a statement from your former qualified tuition program with these amounts along with this form.*

**Proceeds from the withdrawal of a Coverdell Education Savings Account (Coverdell ESA)**

Indicate the amount you are remitting from your Coverdell Education Savings Account (Coverdell ESA) into the selected Investment Portfolio(s) below, and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings below and submit an account statement with these amounts along with your check and this form.*

**Proceeds from the redemption of a qualified U.S. savings bond**

Indicate the amount you are remitting from the redemption of your qualified U.S. savings bond into the selected Investment Portfolio(s) below and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings below and submit a Form 1099 with these amounts along with your check and this form.*

Cost Basis	\$																		
Earnings	\$																		
<b>Total Indirect Rollover Amount</b>	\$																		

Note: Unless the Plan receives an account statement (or, Form 1099 – INT for proceeds from a qualified U.S. savings bond), including a breakdown of cost basis and earnings or interest for your QTP rollover, Coverdell ESA account withdrawal, or qualified U.S. savings bond redemption, as applicable, the entire amount will be treated as earnings and will be reported to the IRS as earnings upon withdrawal.

**3 Contribution Instructions** (You must complete this section or your contribution will be rejected).

- Deposit my check(s) based on my current allocation instructions on file.** (Do not provide instructions in Section 4).
- Override Allocation Instructions.** (By selecting override, this contribution will be based on the allocation instructions you provide in Section 4). This will NOT affect your existing allocations (if any) currently on file.

**4 Select Investment Portfolios**

This will not replace current allocations instructions (if any) currently on file. You can change your Allocation Instructions online, by telephone or by completing the applicable ScholarShare College Savings Plan Form at any time.

Investment Portfolio Name <i>(Portfolio Number)</i>	Check if new Investment Portfolio <sup>1</sup>	Contribution Amount(s)*
Active Age-Based Portfolio	<input type="checkbox"/> New Portfolio	\$ , .
Passive Age-Based Portfolio	<input type="checkbox"/> New Portfolio	\$ , .
Active Diversified Equity Portfolio (2929)	<input type="checkbox"/> New Portfolio	\$ , .
Active Growth Portfolio (2930)	<input type="checkbox"/> New Portfolio	\$ , .
Active Moderate Growth Portfolio (2931)	<input type="checkbox"/> New Portfolio	\$ , .
Active Conservative Portfolio (2932)	<input type="checkbox"/> New Portfolio	\$ , .
Active International Equity Portfolio (2934)	<input type="checkbox"/> New Portfolio	\$ , .
Active Diversified Fixed Income (2935)	<input type="checkbox"/> New Portfolio	\$ , .
Passive Diversified Equity Portfolio (2945)	<input type="checkbox"/> New Portfolio	\$ , .
Passive Growth Portfolio (2946)	<input type="checkbox"/> New Portfolio	\$ , .
Passive Moderate Growth Portfolio (2947)	<input type="checkbox"/> New Portfolio	\$ , .
Passive Conservative Portfolio (2948)	<input type="checkbox"/> New Portfolio	\$ , .
Passive Diversified Fixed Income Portfolio (2949)	<input type="checkbox"/> New Portfolio	\$ , .
Index International Equity Portfolio (2951)	<input type="checkbox"/> New Portfolio	\$ , .
Social Choice Portfolio (2933)	<input type="checkbox"/> New Portfolio	\$ , .
Index Bond Portfolio (2950)	<input type="checkbox"/> New Portfolio	\$ , .
Index U.S. Large Cap Equity Portfolio (2952)	<input type="checkbox"/> New Portfolio	\$ , .
Index U.S. Equity Portfolio (2953)	<input type="checkbox"/> New Portfolio	\$ , .
Principal Plus Interest Portfolio (2954)	<input type="checkbox"/> New Portfolio	\$ , .
<b>Total Contribution Check(s)</b>		\$ , .

\*Currently, there is no minimum subsequent contribution. However, the \$25 minimum subsequent contribution established by the Plan may be reinstated at any time.

**Mail this form to:**



**Overnight Mail**  
 ScholarShare College Savings Plan  
 430 W 7<sup>th</sup> Street Suite 219185  
 Kansas City, MO 64105-1407

**Regular Mail**  
 ScholarShare College Savings Plan  
 P.O. Box 219185  
 Kansas City, MO 64121-9185

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<sup>1</sup> If a new Investment Portfolio is opened, a different portfolio number will be assigned.