NJBEST 529 College Savings Plan

Additional Contribution Form

NJBEST
NEW JERSEY'S
529 COLLEGE SAVINGS PLAN

- Use this form to make additional contributions to your NJBEST 529 College Savings Plan Account by check or rollover.
- For faster processing, you can complete this request online at **NJBEST.com.**
- For your contribution to be invested, you must print clearly all required information and include a check payable to **NJBEST 529 College Savings Plan** for an amount matching the amount below.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.

Note: Your contribution will be invested according to the Allocations for Future Contributions at the time this form is received in good order.

To request assistance in completing this form call us at **(877)4NJ-BEST**, Monday to Friday 8:30 a.m. - 8 p.m. ET.

(877)4NJ-BEST
Monday to Friday 8:30 a.m. - 8 p.m. ET

NJBEST.com

Regular mailing address:
NJBEST 529 College Savings Plan
PO BOX 55795
Boston, MA 02205

Overnight mailing address:
NJBEST 529 College Savings Plan
95 Wells Avenue, Suite 160
Newton, MA 02459

1. Account Information

☐☐☐☐☐☐☐☐☐☐ – ☐☐
Account Number *(Include your Account number on your check.)*

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Account Owner *(First name)* *(M.I.)*

☐☐☐
Account Owner *(Last name)*

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Beneficiary *(First name)* *(M.I.)*

☐☐☐
Beneficiary *(Last name)*

NJD CONTRIBUTION

2. Contribution Method

Source of funds *(Check all that apply.)*

A. ☐ **Check.** Make check payable to **NJBEST 529 College Savings Plan.**
Include your check with this **Additional Contribution Form**. Personal checks (excluding starter checks), bank drafts, teller's checks, cashier's checks, checks issued by a financial institution or brokerage firm payable to you and endorsed over to the Plan by you, and third-party personal checks up to $10,000 endorsed over to the Plan are accepted.

$ ☐☐☐,☐☐☐.☐☐
Amount

B. ☐ **Indirect Rollover.** A check is included from, or in an amount representing a withdrawal from or redemption of, another Section 529 program, Coverdell Education Savings Account, or U.S. Savings Bond (Series EE bonds issued after 1989 or Series I bonds). I certify that the withdrawal or redemption occurred within the last 60 days and that this rollover complies with the applicable requirements for such type of rollover set forth in the NJBEST 529 College Savings Plan Program Description. You must provide an account statement from your former account or IRS form 1099-INT or 1099-Q showing the contribution and earnings portion of the withdrawal or redemption. If these forms are not provided, the entire amount will be treated as earnings. If the check represents a rollover from another Section 529 program to an account for the same Beneficiary, I certify that no such rollover has been made previously within the past 12 months.

$ ☐☐☐,☐☐☐.☐☐ Amount of Rollover

$ ☐☐☐,☐☐☐.☐☐ Principal *(Basis)*

$ ☐☐☐,☐☐☐.☐☐ Earnings

Note: Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts in the Program for the same Beneficiary to exceed the Maximum Contribution Limit. Please refer to the NJBEST 529 College Savings Plan Program Description 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.