

Important information about this form:

- Fill out this form to make a check contribution to your VT529 account.
- You must have an open account to make a contribution. If you need to sign up, go online to www.VT529.org or use an **Enrollment Form** before completing this form.
- Include a check for the contribution amount and make it payable to VT529. Please don't staple.
- The minimum contribution to any portfolio is \$5.
- If you are re-contributing a refund from an eligible educational institution, it must be made within 60 days of receiving the refund.
- Once the contribution has been processed, you must wait 5 business days before you can make a withdrawal.
- If a contribution brings the aggregate market value of all the Beneficiary's 529 College Savings accounts in the state of Vermont above \$550,000 (the maximum account balance), it will be rejected and returned in its entirety.
- Please type or print clearly in capital letters, and use black ink. Please use a paper clip for the check, do not staple sheets together.

Need help?

Give us a call Monday – Friday
from 9am - 8pm ET at

1-800-637-5860

Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:

VT529
PO Box 534482
Pittsburgh, PA 15253-4482

Overnight Mail:

VT529
Attention: 534482
500 Ross Street, 154-0520
Pittsburgh, PA 15262

1 Account information

Name of Account Owner (First and last)

Account Owner's telephone
number

7 7 _____
Account number

2 Contribution information

Select the source of the contribution.

- ☐ Contribution via check (Please fill out **Step 3**)
- ☐ Re-contribution (within 60 days of refund) via check (Please fill out **Step 3** and **Step 4**)

3 Allocate your contribution

Choose the portfolio(s) you want to contribute to. There's a \$5 minimum contribution to any portfolio you choose.

For a full list of all the portfolio options, please visit the Plan website or see the **Plan Disclosure Booklet** for important information about the investment options before making a decision.

Please clearly print the portfolio name, code and amount you'd like to contribute below. Reference the **Portfolio Options Appendix** at the end of this form for a list of all portfolio names and codes.

_____ Code	_____ Portfolio name	\$ _____ Amount
_____ Code	_____ Portfolio name	\$ _____ Amount
_____ Code	_____ Portfolio name	\$ _____ Amount
_____ Code	_____ Portfolio name	\$ _____ Amount
_____ Code	_____ Portfolio name	\$ _____ Amount

\$ _____
Total contribution amount

4 Re-contribution information

The re-contribution amount must not exceed the original withdrawal amount and must be re-contributed within 60 days of the issuance of the refund. If you do not re-contribute the funds, they could be treated as income and the original transaction could be treated as a non-qualified withdrawal. Once the re-contribution is complete, it will not be considered as gross income for federal tax purposes; however, the original distribution will be reported on your 1099-Q federal tax form.

You must provide information about the original transaction, such as the date and amount withdrawn.

___ ___ / ___ ___ / ___ ___ ___ ___

Date of original withdrawal (mm/dd/yyyy)

\$ ___ ___ , ___ ___ . ___ ___

Amount of original transaction

Appendix – VT529 Portfolio Options

For descriptions and details about all of these portfolio options, please go online to www.VT529.org or see the **Plan Disclosure Booklet** for important information including descriptions, details, and risks about the investment options before making a decision.

Year of Enrollment Portfolios

Code	Portfolio Name
VTY44	2044 Enrollment Portfolio
VTY43	2043 Enrollment Portfolio
VTY42	2042 Enrollment Portfolio
VTY41	2041 Enrollment Portfolio
VTY40	2040 Enrollment Portfolio
VTY39	2039 Enrollment Portfolio
VTY38	2038 Enrollment Portfolio
VTY37	2037 Enrollment Portfolio
VTY36	2036 Enrollment Portfolio
VTY35	2035 Enrollment Portfolio
VTY34	2034 Enrollment Portfolio
VTY33	2033 Enrollment Portfolio
VTY32	2032 Enrollment Portfolio
VTY31	2031 Enrollment Portfolio
VTY30	2030 Enrollment Portfolio
VTY29	2029 Enrollment Portfolio
VTY28	2028 Enrollment Portfolio
VTY27	2027 Enrollment Portfolio
VTY26	2026 Enrollment Portfolio
VTYEN	Enrollment Portfolio

Static Portfolios

Code	Portfolio Name
VTEIP	Equity Index
VTBAP	Balanced Portfolio
VTFIP	Fixed-Income Portfolio
VTPPI	Capital Preservation Portfolio

The investment information on this page has been provided by Bank of New York Advisors, the investment advisor for VT529. Before you make a decision, review the Plan Disclosure Booklet to learn about the important details and risks of each investment option.