

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 Account Owner 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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Account Owner or Trustee/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 Minnesota College Savings Plan

Contributions are permitted by personal checks (excluding starter checks), bank drafts, teller's checks and checks issued by a financial institution or brokerage account payable to the Account Owner and endorsed over to the Plan by the Account Owner, and third-party personal checks up to \$10,000 endorsed over to the Plan by the Account Owner. Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts in the Plan 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 Option(s) below and enclose your contribution check(s), payable to the Minnesota College Savings Plan, along with this *Additional Contribution by Mail* form.

Indirect Rollover

To rollover the proceeds from the redemption of another Qualified Tuition Plan account (QTP), submit a check for the amount along with this form. The check must be received within 60 days of the date you received the withdrawal proceeds from the QTP account. *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 in the box 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 Option(s) below and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings in the box below and submit a Form 1099 with these amounts along with your check and this form.*

Cost Basis	\$																			
Earnings	\$																			
Total Amount	\$																			

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 taxable earnings by the Plan 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 Investment Option Information

You may direct your contribution to an existing Investment Option or into a new Investment Option, which will be opened upon receipt of this contribution. The minimum contribution is \$25 per Investment Option. See the *Disclosure Booklet* for more information.

Investment Options	Check if new Investment Option ¹	Contribution Amount(s)																		
Managed Allocation Option (Age-based)	<input type="checkbox"/> New Option	\$																		
Principal Plus Interest Option (1917)	<input type="checkbox"/> New Option	\$																		
U.S. & International Equity Option (1918)	<input type="checkbox"/> New Option	\$																		
Moderate Allocation Option (2300)	<input type="checkbox"/> New Option	\$																		
100% Fixed Income Option (2301)	<input type="checkbox"/> New Option	\$																		
Money Market Option (2302)	<input type="checkbox"/> New Option	\$																		
International Equity Index Option (2303)	<input type="checkbox"/> New Option	\$																		
Aggressive Allocation Option (2295)	<input type="checkbox"/> New Option	\$																		
Conservative Allocation Option (2296)	<input type="checkbox"/> New Option	\$																		
Equity and Interest Accumulation Option (2297)	<input type="checkbox"/> New Option	\$																		
U.S. Large Cap Equity Option (2298)	<input type="checkbox"/> New Option	\$																		
Total Contribution Check(s)		\$																		

Note: If you allocate your contributions to the Principal Plus Interest Option, transfers made at a later date from the Principal Plus Interest Option to the Money Market Option will not be permitted.

Mail to:



Overnight Mail
 Minnesota College Savings Plan
 430 W 7th Street Suite 219455
 Kansas City, MO 64105-1407

Regular Mail
 Minnesota College Savings Plan
 P.O. Box 219455
 Kansas City, MO 64121-9455

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¹ If a new Investment Option is opened, a different option number will be assigned.