Pennsylvania 529 Investment Plan

# Additional Purchase Form

PENNSYLVANIA TREASURY 529 COLLEGE SAVINGS PROGRAM

- Complete this form to make additional contributions to your account by check.
- If you want to make an additional contribution by direct rollover from another 529 plan, complete an Incoming Rollover Form, which is available online at **www.PA529.com** or by calling **1-800-440-4000**.
- Clearly print all required information and include a check made payable to: PA 529 Investment Plan. Your investment will be delayed if proper information is not received. **Note:** Your contribution will be invested according to the allocation instructions on file for your account at the time this form is received in good order.
- Please include your account number on your check.
- Print clearly, preferably in capital letters and black ink.

Return this form along with a check and any other required documents in the enclosed envelope, or mail to: **Pennsylvania 529 Investment Plan, P.O. Box 55378, Boston, MA 02205-5378**. For overnight delivery or registered mail, send to: **Pennsylvania 529 Investment Plan, 95 Wells Avenue, Suite 155, Newton, MA 02459-3204**.

☐☐☐☐☐☐☐☐☐–☐☐ *(Include your account number on your check.)*

Account Number

**Name of Account Owner** *(first, middle initial, last)*

**Name of Beneficiary** *(first, middle initial, last)*

**Source of Funds** *(Complete A, B, or both.)*

**Contributions and rollovers by check will be available for withdrawal after ten calendar days.**

**A.** ☐ **Personal check.** *(Make your check payable to: PA 529 Investment Plan.)* The Plan will not accept contributions made by starter check, bank courtesy check, instant loan check, credit card check, traveler's check, foreign check not in U.S. dollars, checks dated over 180 days in the past and greater than $10,000, checks dated more than 7 days in the future and greater than $10,000, checks with unclear instructions, or any other check the Plan deems unacceptable.

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Amount

**B.** ☐ **Indirect rollover from another qualified 529 plan, an education savings account (ESA), or a qualified U.S. savings bond.**

- **Indirect rollover from another qualified 529 plan or an ESA.** Enclose documentation from the distributing financial institution detailing a breakdown of contributions and earnings.
- **Indirect rollover from a qualified U.S. savings bond.** Attach a statement or IRS Form 1099-INT issued by the distributing financial institution that shows the interest paid upon redemption.

**If you do not provide the necessary documentation, the entire amount will be considered earnings, which could result in adverse tax consequences, particularly if you later make a nonqualified withdrawal from your PA 529 Investment Plan account.**

$ ☐☐☐,☐☐☐.☐☐ Contributions

$ ☐☐☐,☐☐☐.☐☐ Earnings

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