



Schwab 529 College Savings Plan Additional Contribution Form

- Complete this form to make additional contributions to your Schwab 529 Plan Account by check or rollover.
- For your contribution to be invested, you must clearly print all required information and include a check payable to the **Schwab 529 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 below.

Note: Your contribution will be invested according to the standing allocation instructions on file for your Account at the time this form is received in good order.

<p>Return the completed form and any other required documents to:</p> <p>Schwab 529 Plan P.O. Box 2906 Shawnee Mission, KS 66201-2906</p>	<p>Forms can be downloaded from our website at schwab.com/forms, or you can call us to order any form—or request assistance in completing this form—at 1-888-903-3863.</p>
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Account Number (Include your account number on your check.)

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Name of Account Owner/Responsible Individual/Custodian (first, middle initial, last) or Trust

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

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Source of Funds.

A. **Personal check. Important:** All checks must be made payable to the **Schwab 529 Plan**.

\$ Amount

Amount

B. **Indirect rollover from another qualified 529 plan, an Education Savings Account (ESA), or 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 qualified U.S. savings bonds**—Please attach a statement or IRS Form 1099-INT issued by the distributing financial institution that shows the interest paid upon redemption.

Important: If you do not provide this documentation, the entire amount will be considered earnings, which could result in adverse tax consequences, particularly if you later make a non-qualified distribution from your Schwab 529 Plan Account.

\$ Contributions

Contributions

\$ Earnings

Earnings



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