CONNECTICUT HIGHER EDUCATION TRUST COLLEGE SAVINGS PROGRAM

# Connecticut Higher Education Trust
# Additional Contribution by Mail

Use this form to contribute to an existing Program Account

***Questions?*** Call toll-free 1-888-799-CHET (1-888-799-2438)
P.O. Box 150499, Hartford, CT 06115-0499
Visit www.aboutCHET.com

***Instructions***

- Use this *Additional Contribution by Mail* form only to contribute to an existing Program Account. (You must complete an *Account Application* to open an Account for another Account Owner and/or Beneficiary.)
- A separate *Additional Contribution by Mail* form is required for each Account. You can obtain additional copies of this form, or any Program form, by calling the Program or by visiting *www.aboutCHET.com* and clicking on *Account Forms*.
- Print in capital letters using blue or black ink. Mail this form to the Program at the above address, along with your contribution check(s).

## 1 Account Information *(Refer to your Account statement.)*

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|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

*Fund and Program Account Number (Provide any one from your statement.)*

*Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name*

*Beneficiary Name (First, MI, Last, Suffix)*

## 2 Contribution Check Information *(Check one or both, if applicable.)*

**Make check(s) payable to the *Connecticut Higher Education Savings Trust*.** Contributions are permitted by personal checks (excluding starter checks), bank drafts, teller's checks, money orders and checks issued by a financial institution or brokerage account payable to the Account Owner and endorsed over to the Program by the Account Owner, and third-party personal checks up to $10,000. Checks must be drawn on a U.S. banking institution and must be payable in U.S. dollars. The Maximum Account Balance Limit is $300,000 per Beneficiary.

**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.

☐ **Regular Contribution Check(s)**

☐ **Rollovers Check(s) under I.R.C. § 529** If you have already received a check from another Qualified Tuition Program or a Coverdell Education Savings Account (Education IRA), the Program must receive your contribution check within 60 days of the date of withdrawal from the other program to qualify for rollover treatment.

Your rollover check may be endorsed to the *Connecticut Higher Education Trust*, regardless of amount, if the check issued by your former account is payable to you. You can also submit a personal check (excluding starter checks) for the amount you received as a rollover from the former account. Unless the Program receives a statement, including a breakdown of earnings and contributions for your original account, the entire rollover amount will be treated as earnings and will be reported as earnings upon withdrawal.

## 3 Investment Option Information *(You must complete this section or your contribution will be rejected.)*

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** *(Fund Code)* | **Is this a new investment option?** | **Contribution Amount(s)** |
|---|---|---|
| Managed Allocation Option (Age based) | ☐ Yes OR ☐ No | $ , . |
| Aggressive Managed Allocation Option (Age based) | ☐ Yes OR ☐ No | $ , . |
| High Equity Option (1955) | ☐ Yes OR ☐ No | $ , . |
| 100% Equity Index Option (2251) | ☐ Yes OR ☐ No | $ , . |
| Social Choice Equity Option (2260) | ☐ Yes OR ☐ No | $ , . |
| Principal Plus Interest Option (1956) | ☐ Yes OR ☐ No | $ , . |
| 100% Fixed Income Option (2253) | ☐ Yes OR ☐ No | $ , . |
| Money Market Option (2261) | ☐ Yes OR ☐ No | $ , . |
| **Total Contribution Check(s)** | | $ , . |

## Mail this form to:

Connecticut Higher Education Trust
P.O. Box 150499
Hartford, CT 06115-0499

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