

DO NOT STAPLE

MOST—Missouri's 529 Education Plan

Additional Deposit Form



- 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.missourimost.org** or by calling **888-414-MOST** (888-414-6678).
- For your contribution to be invested, you must clearly print all required information and include a check made payable to: *MOST—Missouri's 529 Education Plan*. Make sure to include your account number on your check. If you don't include the required information on this form, your investment will be delayed until the proper information is 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.
- Print clearly, preferably in capital letters and black ink.

Return this form along with a check and any other required documents in the enclosed postage-paid envelope, or mail to **MOST—Missouri's 529 Education Plan, P.O. Box 219212, Kansas City, MO 64121-9212**. For overnight delivery or registered mail, send to **MOST—Missouri's 529 Education Plan, 1001 E 101st Terrace, Suite 200, Kansas City, MO 64131**.

(Include your account number on your check or money order.)

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 not be available for withdrawal for seven calendar days.

- A. ☐ **Personal check.** Make your check (or money order) payable to: *MOST—Missouri's 529 Education 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, check dated more than 180 days before the plan receives it, postdated check, check with unclear instructions, or any other check the plan deems unacceptable.

\$

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 of the rollover will be considered earnings, which could result in adverse tax consequences, particularly if you later make a nonqualified withdrawal from your plan account.

\$

Contributions

\$

Earnings



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