



NC 529 Plan
 P.O. Box 40877
 Raleigh, NC 27629-0877

Account Owner _____
Beneficiary _____
Account Number _____

If this contribution is a "rollover" from another state's 529 plan, Coverdell Education Savings Account, or a qualified U.S. savings bond, see page 2 for further instructions.

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Amount Enclosed (\$25.00 Minimum)

Make checks payable to NC 529 Plan

CFNC.org/NC529 800-600-3453

CFI Form C420ab (08/08)



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If this contribution to your NC 529 Plan is a rollover from another state's 529 plan, a Coverdell Education Savings Account, or a U.S. Savings Bond, you must provide documentation related to the principal and earnings portion of your assets for tax purposes. If we do not receive this information, your contribution will be designated as 100% earnings and will be fully taxable at distribution.

- **529 Plan Assets** (held in another state's plan): Provide an account statement issued by the state's 529 program which shows the earnings or loss portion of your withdrawal.
- **Coverdell Education Savings Accounts:** Provide an account statement or documentation issued by the account custodian that shows the basis and earnings in your account.
- **U.S. Savings Bond:** Provide an account statement or IRS Form 1099-INT from the redeeming institution that shows the interest which has accrued on the bond.

Please note your contributions will be allocated according to your most recent investment allocation instructions.