



Schedule CT-CHET

Connecticut Higher Education Trust (CHET)
529 College Savings Plan Contribution

2015

Your Social Security Number •

Complete return in blue or black ink only.

Attach completed Schedule CT-CHET to the back of your Connecticut return.

Complete **Schedule CT-CHET** to contribute all or part of your Connecticut individual income tax overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) to a CHET College Savings Plan Account(s). You **must** provide the following information to identify the CHET Plan, account number, and beneficiary. Before completing this schedule review the most recent CHET Account Statement to correctly identify all account information. See instructions on back page.

For more information about CHET account(s), contact:

CHET Advisor (The Hartford)
P.O. Box 2800, Enfield, CT 06083-2800
Call - 877-407-2828
Internet - www.chetadvisor.com

OR

CHET Direct (TIAA-CREF)
P.O. Box 150499, Hartford CT 06115-0499
Call - 888-799-2438
Internet - www.aboutCHET.com
Email - info@aboutchet.com

Beneficiary #1

Beneficiary 1 - First name

MI

Last name (If two last names, insert a space between names.)

CHET Plan and Account Information
(enter only one plan and account number)

Check the box to select your CHET Plan (only one) and enter the corresponding account number:

☐ CHET Advisor 529 College Savings Plan (The Hartford)

☐ CHET Direct 529 College Savings Plan (TIAA-CREF)

CHET Advisor Account Number

OR

CHET Option #

CHET Direct Account Number

1. **Amount of contribution:** Identify the amount of your Connecticut overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) you elect to contribute to Beneficiary 1.
This contribution is irrevocable.

1. .00

Beneficiary #2

Beneficiary 2 - First name

MI

Last name (If two last names, insert a space between names.)

CHET Plan and Account Information
(enter only one plan and account number)

Check the box to select your CHET Plan (only one) and enter the corresponding account number:

☐ CHET Advisor 529 College Savings Plan (The Hartford)

☐ CHET Direct 529 College Savings Plan (TIAA-CREF)

CHET Advisor Account Number

OR

CHET Option #

CHET Direct Account Number

2. **Amount of contribution:** Identify the amount of your Connecticut overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) you elect to contribute to Beneficiary 2.
This contribution is irrevocable.

2. .00

Beneficiary #3

Beneficiary 3 - First name

MI

Last name (If two last names, insert a space between names.)

CHET Plan and Account Information
(enter only one plan and account number)

Check the box to select your CHET Plan (only one) and enter the corresponding account number:

☐ CHET Advisor 529 College Savings Plan (The Hartford)

☐ CHET Direct 529 College Savings Plan (TIAA-CREF)

CHET Advisor Account Number

OR

CHET Option #

CHET Direct Account Number

3. **Amount of contribution:** Identify the amount of your Connecticut overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) you elect to contribute to Beneficiary 3.
This contribution is irrevocable.

3. .00

4. **Total CHET Individual Savings Plan contribution(s):**
Add **Schedule CT-CHET**, Lines 1, 2, and 3. Enter here and on **Form CT-1040**, Line 24, or **Form CT-1040NR/PY**, Line 26.

4. .00

See instructions.

Schedule CT-CHET - Instructions

This schedule **must** be attached to the back of Form CT-1040 or CT-1040NR/PY.

General Instructions

Contributions must be made into existing Connecticut Higher Education Trust (CHET) 529 College Savings Plans. Participating plans are **CHET Advisor** (through The Hartford) or **CHET Direct** (through TIAA-CREF).

This contribution is irrevocable.

You can only make contributions to a total of 3 CHET accounts. If the same beneficiary has more than one account, you must enter the contributions as separate beneficiaries.

Any contribution that is rejected for deposit by either fund will be returned to the Department of Revenue Services (DRS) and a refund will be issued to you in the form of a paper check.

If you have an overpayment and are due a refund, all or part of your overpayment may be used to pay outstanding debts or taxes. Your overpayment will be applied in the following order:

1. Penalty and interest you owe DRS;
2. Other taxes you owe DRS;
3. Debts to other Connecticut state agencies;
4. Federal taxes you owe the Internal Revenue Service;
5. Taxes you owe to other states;
6. Amounts designated by you to be applied to your 2015 Connecticut estimated tax; **and**
7. CHET and designated charitable contributions.

If your CHET contribution is reduced, you will receive an explanation.

Completing the Schedule

Beneficiary's Name

Enter the beneficiary's first name, middle initial, and last name, as it appears on the account statement.

CHET Plan

Check the box to identify the CHET Plan, **CHET Advisor 529 College Savings Plan** (The Hartford) or **CHET Direct 529 College Savings Plan** (TIAA-CREF). You **must** check off the box for one CHET Plan for each beneficiary.

CHET Account Number

Enter the account numbers identified on the account statement.

For **CHET Advisor** (The Hartford) the number is found on Page 1 of the account statement. In the boxes provided, enter the 9-digit number followed by the 2-digit number (after the dash).

For **CHET Direct** (TIAA-CREF), the Investment Option code is the first four digits that are found on Page 2 of the account statement under Transaction Activities. The CHET Direct Account Number is found on the front of the account statement.

Lines 1, 2, and 3

Enter the amount of your contribution for each beneficiary on Line 1, 2, or 3.

Line 4

Add Lines 1, 2, and 3. Your total contributions must be equal to or less than your Connecticut overpayment (Form CT-1040, Line 22; Form CT-1040NR/PY, Line 24.).

For more information about CHET account(s), contact:

CHET Advisor (The Hartford)

P.O. Box 2800, Enfield, CT 06083-2800

877-407-2828

www.chetadvisor.com

CHETadvisor@hartfordfunds.com

CHET Direct (TIAA-CREF)

P.O. Box 150499, Hartford CT 06115-0499

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