

2016 Schedule OR-529



Office use only

Oregon 529 College Savings Plan Direct Deposit for Personal Income Tax Filers

Submit original form—do not submit photocopy.

Form with fields for First name and initial, Last name, Social Security number (SSN), Spouse's first name and initial, Spouse's last name, Spouse's SSN.

Would you like to deposit all or a portion of your refund into an Oregon 529 College Savings Plan account? If so, follow the instructions below.

Requirements

- To make this choice, you must have an open Oregon 529 College Savings Plan account. For more information, see contact information below.
Deposits must be a minimum of \$25 per account.
If your refund is used to pay a debt you owe or the amount you elect to deposit exceeds your available refund, your deposit will be cancelled. Any remaining refund will be refunded by check or direct deposit.

Instructions

You may deposit all or a portion of your refund in up to four accounts. Complete all the fields below for each account.

- Select the account manager—Oregon College Savings Plan or MFS 529 Savings Plan;
Enter the four-digit portfolio number (for more information on portfolio options, contact your account manager);
Enter the nine- or ten-digit account number;
Enter the amount to be deposited into each account; and
Total the amounts to be deposited.

Form with 4 rows for account selection, each with checkboxes for Oregon College Savings Plan or MFS 529 Savings Plan, and input fields for Portfolio no., Account no., and Amount \$.

Contact information

Oregon 529 College Savings Network www.oregon529network.com Phone: (503) 373-1903 Email: college.savings@ost.state.or.us
Oregon College Savings Plan www.oregoncollegesavings.com/ Phone: 1 (866) 772-8464
MFS 529 Savings Plan https://annex.mfs.com/subs/oregon/index.html Phone: 1 (866) 529-1637

— You must include this schedule with your Oregon income tax return to have your refund applied —