

Oregon College Savings Plan Direct Deposit and Account Creation Election for Personal Income Tax Filers

Page 1 of 2 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

Instructions. Use this schedule to deposit your refund in up to four existing Oregon College Savings Plan or MFS 529 Savings Plan accounts or to elect to share your information with the Oregon 529 Savings Board for the purpose of establishing an Oregon College Savings Plan account. For more information, see Schedule OR-529 Instructions.

Part 1: Oregon College Savings Plan Direct Deposit.

1. Check one: 1a. ☐ Oregon College Savings Plan; or 1b. ☐ MFS 529 Savings Plan

1c. Portfolio number

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1d. Account number

[illegible]

1e. Amount.....1e.

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2. Check one: 2a. ☐ Oregon College Savings Plan; or 2b. ☐ MFS 529 Savings Plan

2c. Portfolio number

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2d. Account number

[illegible]

2e. Amount.....2e.

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3. Check one: 3a. ☐ Oregon College Savings Plan; or 3b. ☐ MFS 529 Savings Plan

3c. Portfolio number

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3d. Account number

[illegible]

3e. Amount.....3e.

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4. Check one: 4a. ☐ Oregon College Savings Plan; or 4b. ☐ MFS 529 Savings Plan

4c. Portfolio number

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4d. Account number

[illegible]

4e. Amount.....4e.

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5. Total. Add lines 1e–4e. Enter this amount on your return..... 5.

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Part 2: Oregon College Savings Plan Account Creation Election.

Taxpayer email

Beneficiary first name

Initial

Beneficiary last name

Beneficiary Social Security number (SSN)

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Beneficiary date of birth (MM/DD/YYYY)

 / /

Relationship code (see instructions):

Beneficiary address (no PO Box)

City

State

ZIP code

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Sign here. I authorize the Department of Revenue to release information to the Oregon 529 Savings Board for the purpose of establishing an Oregon College Savings Plan Account.

Taxpayer's signature

☒

Date (MM/DD/YYYY)

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— You must include this schedule with your Oregon income tax return —

