

Part 2: Embark Account Creation Election.

Taxpayer email

Beneficiary first name

Initial

Beneficiary last name

Beneficiary Social Security number (SSN)

 - -

Beneficiary date of birth (MM/DD/YYYY)

 / /

Relationship code (see instructions)

Beneficiary address (no PO Box)

City

State

ZIP code

 -

Election. I have completed all of the fields in Part 2 of this form for the purpose of establishing an Embark account for the beneficiary named above, and I authorize the Department of Revenue to release this information to Upward Oregon for this express purpose.

Taxpayer signature

X

Date (MM/DD/YYYY)

 / /

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

