

# NC 529 Plan

North Carolina's National College Savings Program



## A Gift for the Future

**Make checks payable to: "NC 529 Plan"**

For a meaningful, long-lasting birthday, holiday, or "just because" gift, a Contribution to a 529 college savings account may be the answer. To show you encourage higher education as part of the Account Beneficiary's future, complete the Gift Instructions below and send this form and your check to North Carolina's National College Savings Program.

- The minimum Contribution per Account is \$25.
- If you have questions about gift limits and tax considerations, please consult your financial or tax advisor.
- Contributions from anyone other than the Participant (owner of the Account) become the property of the Participant, regardless of the relationship or the identity of the contributor. Your gift will be invested as directed in the investment instructions on file for the Participant.
- All Contributions are subject to the prohibition under federal law and the Program Rules against Contributions in excess of those necessary to provide for the Qualified Higher Education Expenses of the Beneficiary.

**Mail to:** NC 529 Plan  
P.O. Box 40877  
Raleigh, NC 27629-0877

**Overnight or Registered mail:** NC 529 Plan  
2917 Highwoods Blvd.  
Raleigh, NC 27604

**Fax:** 919-835-2304

For questions or forms, contact the Program Administrator College Foundation, Inc.

Please print clearly in capital letters and dark ink.

### GIFT INSTRUCTIONS

Complete all sections below and return to North Carolina's National College Savings Program.

#### 1. ACCOUNT INFORMATION

Please direct this gift to the Account of:

Name of Participant, the person who owns the Account (first, middle initial, last)

For the benefit of:

Name of Beneficiary, the future college student (first, middle initial, last)

Account Number (if known): -

On the occasion of:   
Event (birthday, graduation, holiday, etc.)

#### 2. GIFT CARD

A gift card will be mailed within 5 business days of receiving your Contribution; it is for acknowledgment only and will not specify an amount.

Check one.

Send the gift acknowledgment card to the:

- Contributor (also complete Section 4)
- Participant (card will be sent to the address on file)
- Beneficiary (also complete Section 3)

