



Michigan Education Savings Program

# Michigan Education Savings Program

## Additional Contribution by Mail

Use this form to contribute to an existing Program Account  
**Questions?** Call toll-free 1-877-861-MESP (1-877-861-6377),  
 Monday through Friday, 8:00 a.m. – 10:00 p.m. ET  
 P.O. Box 30361, Lansing, MI 48909-7861  
 Visit [www.misaves.com](http://www.misaves.com)

### Instructions

- Use this *Additional Contribution by Mail* form only to contribute to an existing Program Account. (You must complete an *Account Application* to open an Account for another Account Owner and/or Beneficiary.)
- A separate *Additional Contribution by Mail* form is required for each Account. You can obtain additional copies of this form, or any Program form, by calling the Program or by visiting [www.misaves.com](http://www.misaves.com) and clicking on *Account Forms*.
- Print in capital letters using blue or black ink. Mail this form to the Program at the above address, along with your contribution check(s).

### 1 Account Information (Refer to your Account statement.)

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Fund and Program Account Number (Provide any one from your statement.)

Day Telephone Number

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Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name

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Beneficiary Name (First, MI, Last, Suffix)

### 2 Contribution Check Information (Check one or both, if applicable.)

Make checks payable to, or appropriately endorse to, the *Michigan Education Savings Program*. The Maximum Account Balance Limit is \$235,000 per Beneficiary.

#### A note about Uniform Gift to Minors/Uniform Transfers to Minors Accounts (UGMA/UTMA):

If your contribution check represents proceeds from an UGMA/UTMA account, those funds can only be deposited into another UGMA/UTMA account for the same Beneficiary, subject to applicable law governing such accounts. Your contribution check may be endorsed to the Program, regardless of amount, if the check issued by your former account is payable to you as custodian or to the minor. You can also submit a personal check for the amount you received from the former account.

- Contribution Check(s)** Contributions are permitted by personal checks, money orders, bank drafts, teller's checks and checks issued by a financial institution or brokerage account payable to the Account Owner and endorsed over to the Program by the Account Owner, and third-party personal checks up to \$10,000 endorsed over to the Program by the Account Owner.
- Rollovers Check(s) under I.R.C. § 529** If you have already received a check from another Qualified Tuition Program, Coverdell Education Savings Account (Education IRA) or from the redemption of qualified U.S. Savings Bonds, the Program must receive your contribution check within 60 days of the date of withdrawal from the other program to qualify for rollover treatment. Your rollover check may be endorsed to the *Michigan Education Savings Program*, regardless of amount, if the check issued by your former account is payable to you. You can also submit a personal check for the amount you received as a rollover from the former account. Unless the Program receives a statement, including the breakdown of earnings and contributions for your original account, the entire rollover amount will be treated as earnings.

### 3 Investment Option Information (You must complete this section or your contribution will be rejected.)

You may direct your contribution to an existing Investment Option or into a new Investment Option, which will be opened upon receipt of this contribution. The minimum contribution is \$25 per Investment Option. See the *Disclosure Booklet* for more information.

Investment Options	Is this a new investment option?	Contribution Amount(s)
Conservative Age Based Allocation Option	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
Moderate Age Based Allocation Option	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
Aggressive Age Based Allocation Option	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
Principal Plus Interest Option (1934)	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
100% Equity Option (1933)	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
Balanced Option (2190)	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
100% Fixed Income Option (2191)	<input type="checkbox"/> Yes OR <input type="checkbox"/> No	\$ , .
<b>Total Contribution Check(s)</b>		\$ , .

### Mail this form to:

Michigan Education Savings Program  
 P.O. Box 30361  
 Lansing, MI 48909-7861



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