

Important information about this form:

- Fill out this form to make a check contribution to your Oregon College Savings Plan account.
- You must have an open account to make a contribution. If you need to sign up, go online to www.OregonCollegeSavings.com or use an **Enrollment Form** before completing this form.
- Include a check for the contribution amount and make it payable to the Oregon College Savings Plan. Please don't staple.
- The minimum contribution to any portfolio is \$5.
- If you are re-contributing a refund from an eligible educational institution, it must be made within 60 days of receiving the refund.
- Once the contribution has been processed, you must wait 5 business days before you can make a withdrawal.
- If a contribution brings the aggregate market value of all the Beneficiary's 529 College Savings accounts in the state of Oregon above \$400,000 (the maximum account balance), it will be rejected and returned in its entirety.
- Make sure you use black ink to type or print clearly in capital letters. Please use a paper clip for the check, do not staple.

Need help?

Give us a call Monday – Friday
from 6am – 5pm PT at
1-866-772-8464

Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:

Oregon College Savings Plan
P.O. Box 534440
Pittsburgh, PA 15253- 4440

Overnight Mail:

Oregon College Savings Plan
Attention: 534440
500 Ross Street, 154-0520
Pittsburgh, PA 15262

Fax

833-286-8172

1 Account information

Name of Account Owner (First and last)

Account Owner's Social Security or
Taxpayer Identification Number

Account number (May be 12 or 13 digits)

2 Contribution information

Select the source of the contribution.

- Contribution via check (Please fill out **Step 3**)
- Re-contribution (within 60 days of refund) via check (Please fill out **Step 3** and **Step 4**)

3 Allocate your contribution

Choose the portfolio(s) you want to contribute to. There's a \$5 minimum contribution to any portfolio you choose.

For a full list of all the portfolio options, please visit the Plan website or see the **Plan Disclosure Booklet** for important information about the investment options before making a decision.

Please clearly print the portfolio name, code and amount you'd like to contribute below. Reference the **Portfolio Options Appendix** at the end of this form for a list of all portfolio names and codes.

_____	_____	\$ _____ , _____ . _____
Code	Portfolio name	Amount
_____	_____	\$ _____ , _____ . _____
Code	Portfolio name	Amount
_____	_____	\$ _____ , _____ . _____
Code	Portfolio name	Amount
_____	_____	\$ _____ , _____ . _____
Code	Portfolio name	Amount
_____	_____	\$ _____ , _____ . _____
Code	Portfolio name	Amount

\$ _____ , _____ . _____
Total contribution amount

4 Re-contribution information

The re-contribution amount must not exceed the original withdrawal amount and must be re-contributed within 60 days of the issuance of the refund. If you do not re-contribute the funds, they could be treated as income and the original transaction could be treated as a non-qualified withdrawal. Once the re-contribution is complete, it will not be considered as gross income for federal tax purposes; however, the original distribution will be reported on your 1099-Q federal tax form.

You must provide information about the original transaction, such as the date and amount withdrawn.

__ __ / __ __ / __ __ __ __
Date of original withdrawal (mm/dd/yyyy)

\$ __ __ __ , __ __ __ . __ __
Amount of original transaction

Appendix – Oregon College Savings Plan Portfolio Options

For descriptions and details about all of these portfolio options, please go online to www.OregonCollegeSavings.com or see the **Plan Disclosure Booklet** for important information including descriptions, details, and risks about the investment options before making a decision.

College Enrollment Year

Code	Portfolio Name
ORC42	Enrollment Year 2042
ORC41	Enrollment Year 2041
ORC40	Enrollment Year 2040
ORC39	Enrollment Year 2039
ORC38	Enrollment Year 2038
ORC37	Enrollment Year 2037
ORC36	Enrollment Year 2036
ORC35	Enrollment Year 2035
ORC34	Enrollment Year 2034
ORC33	Enrollment Year 2033
ORC32	Enrollment Year 2032
ORC31	Enrollment Year 2031
ORC30	Enrollment Year 2030
ORC29	Enrollment Year 2029
ORC28	Enrollment Year 2028
ORC27	Enrollment Year 2027
ORC26	Enrollment Year 2026
ORC25	Enrollment Year 2025
ORC24	Enrollment Year 2024
ORC23	Enrollment Year 2023
ORC22	Enrollment Year 2022
ORC21	Enrollment Year 2021
ORC20	Enrollment Year 2020
ORC19	Enrollment Year 2019
ORC18	Enrollment Year 2018

Static Portfolios

Code	Portfolio Name
ORCCO	Target Risk – Conservative
ORCMO	Target Risk – Moderate
ORCAG	Target Risk – Aggressive
ORCDU	Diversified U.S. Equity
ORCDI	Diversified International Equity
ORCDF	Diversified Fixed Income
ORCIN	Diversified Inflation Protection
ORCBI	Balanced Index
ORCSC	Social Choice Balanced
ORCSF	Short-Term Fixed Income Index
ORCUE	U.S. Equity Index
ORCIE	International Equity Index
ORCFI	Fixed Income Index
ORCXX	FDIC-Insured Option

The investment information on this page has been provided by Sellwood Consulting, the investment advisor for the Oregon College Savings Plan. Before you make a decision, review the Plan Disclosure Booklet to learn about the important details and risks of each investment option.