

Important information about this form:

- Fill out this form to make a full or partial withdrawal from your Oregon College Savings Plan account.
- We are required to file an IRS Form 1099-Q when you make a withdrawal from your account.
- There's a \$5 minimum withdrawal for each portfolio.
- You can withdraw up to 95% of the total amount in a portfolio or the full amount. The minimum balance for each portfolio is \$5 unless you decide to withdraw the full amount.
- You must wait 5 days before you can withdraw a contribution made by bank ACH or check.
- Withdrawals may have tax consequences depending on how the distribution is used. You should consult your tax advisor.
- Keep all of your receipts for qualified education expenses for tax purposes.
- **A notary signature is only required for the following withdrawal requests;** (i) for an Entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner or (ii) if you recently changed your banking information, and wish to bypass a 10-day hold period for withdrawals or (iii) if you recently updated your address, and wish to bypass a 15-day hold period for withdrawals or (iiii) for withdrawal requests of \$100,000 or more. **(Step 8)**.
- Use black ink to type or print clearly, and do not staple the sheets together.

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 Withdrawal amount

Choose the portfolio(s) you want to withdraw money from. There's a \$5 minimum withdrawal per portfolio and you must have at least \$5 in a portfolio to keep it open. You can withdraw up to 95% of the total amount or the full amount.

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

You must wait 5 days before you can withdraw a contribution made by bank ACH or check contribution.

Please clearly print the portfolio name, code and amount you'd like to withdraw 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
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	
Code	Portfolio name	\$ Amount
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	
Code	Portfolio name	\$ Amount
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	
Code	Portfolio name	\$ Amount
	<input type="radio"/> Full balance <input type="radio"/> Partial amount	

Want to withdraw all funds?

<input type="radio"/> Yes, withdraw the full balance of all portfolios I'm invested in.	\$ Total withdrawal amount
<input type="radio"/> Close this account <small>Only check this if you want to close your account once all funds are withdrawn.</small>	

3 Payee information

- Account Owner/Custodian
This will be the tax responsible party who will receive the 1099-Q form.
- Beneficiary
This will be the tax responsible party who will receive the 1099-Q form.
- Check to eligible Educational Institution or School (Skip to **Step 6**)
The Beneficiary will be the tax responsible party who will receive the 1099-Q form.

4 Delivery information

- Deposit into bank account (Continue to **Step 5**)
- Check sent to mailing address listed on the account (Skip to **Step 7**, \$2.50 fee)

* If the address for this individual (where the check will be mailed) has changed in the last 15 days you'll need to get a notarization acknowledgement in **Step 8**.

5 Bank account information

Only fill out this information if you are making a withdrawal to a bank account connected to your account.

If the information for this bank account has been changed in the last 10 days, you'll need to get a notarization acknowledgement in **Step 8**.

Name on bank account

The Account Owner/Custodian or Beneficiary must own the bank account connected to the Plan account.

Bank Account Holder Signature

(If different from Plan Account Owner/Custodian)

Bank account type Checking Savings

Bank name

Bank routing number

Bank account number

Need help?

You can find your bank information on the bottom of one of your checks here:

⑆000000000000⑆ 000000000000⑆ 1000
Routing Account
Number Number

6 Eligible Educational Institution or School information

Only fill this information out if you are making a withdrawal to an eligible educational institution.

Please confirm the mailing instructions with your school before submitting this form for payment and provide a student ID, if required by the school.

Eligible Educational Institution or School name

Student name, ID or other identifying information (Will only appear on the check)

Institution or School mailing address 1

Institution or School mailing address 2

City

State _____
ZIP Code

7 Sign the form

By signing below, I certify that the information contained in this form is true, complete and correct. I authorize a withdrawal from my account based on this information. I have received the **Plan Disclosure Booklet** with respect to tax consequences of such a withdrawal and my record keeping obligations, and understand and agree to all terms as presented here and in the **Plan Disclosure Booklet**.

If I am making contributions by payroll deduction, I understand that my payroll contributions will continue into this Account, regardless of the amount withdrawn, unless I notify my employer to stop my payroll deduction, or I submit an updated **Payroll Deduction Form** to reallocate payroll contributions among my other Account(s), if any.

I certify that I am the Account Owner, or I have the authority to act as the Account Owner. If I am an individual acting in a legal capacity as a representative of the Account Owner, or an Entity Account Owner, a notarization acknowledgement appears below.

Signature of Account Owner/Custodian/Authorized Representative
of Entity

Date (mm/dd/yyyy)

8 Notarization acknowledgement

Keep in mind that:

- You're providing the following information as underwritten certification that your signature is genuine.
- You cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the Account.

Only sign if you are in the presence of a notary public or other officer providing notarization.

The undersigned has read the foregoing in its entirety before signing. IN WITNESS WHEREOF, I have hereunto

set my hand this _____ day of _____, 20_____.
Day (#) Month Year

Signature of Beneficiary or Authorized Legal Representative

State of _____, County of _____

This instrument was acknowledged before me

physical presence online notarization

on _____
Date (mm/dd/yyyy)

by _____
Name of person (First and last)

My term expires: _____
Date (mm/dd/yyyy)

Notary Public (Seal)

Signature of Notary Public

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.