



2009 YEAR-END TAX REMINDERS

Save for college. Save on taxes.

- Contributions for the 2009 tax year are due at the Utah Educational Savings Plan office before **5:00 p.m. (Mountain Time), Thursday, December 31, 2009**. (This includes online contributions.) Mailed contributions postmarked on or before this date but **not received** at the Utah Educational Savings Plan office until 2010 will be applied as a 2010 contribution and qualify towards the 2010 tax credit.
- In 2009, Utah taxpayers can claim a 5 percent tax credit on UESP contributions. If filing an individual tax return, contributions up to \$1,740 *per beneficiary* count toward the credit. If filing a joint return, contributions up to \$3,480 *per beneficiary* count toward the credit. To receive the credit, the beneficiary on the account must have been designated as such before their 19th birthday.
- Utah residents do not receive a Utah state tax credit for contributions to other states' 529 plans.
- For more information, call 800.418.2551 or visit our Web site at www.uesp.org.

Instructions for sending your contribution.

1

ONLINE

1. Go to www.uesp.org
2. Log into *Account Access*
3. Click *Manage Contributions* and select a contribution type
4. Enter banking information

Carefully enter and verify your banking information

2

STANDARD MAIL

Utah Educational Savings Plan
PO Box 145100
Salt Lake City, UT 84114-5100

Allow adequate time to mail your contribution

Write the account number and beneficiary's name on the check

3

HAND/OVERNIGHT DELIVERY

Utah Educational Savings Plan
Board of Regents Building
Gateway 2, 60 South 400 West
Salt Lake City, UT 84101-1284

If delivering in person, allow adequate time to find parking

Write the account number and beneficiary's name on the check



Form 110

Account Owner/Agent Signature Card

For UESP Use Only	○
UESP ID No. _____	
Date Received by UESP _____	
User Initials _____	

- Please complete this form in its entirety. The information and signature you provide below will be used to validate current and future account transactions such as withdrawals, internal transfers, and account information changes.
- Only one Account Owner/Agent Signature Card per account owner is required to be submitted to UESP.
- Failure to complete and submit this document may delay future account transactions.
- Please print clearly—preferably in capital letters, using black or blue ink.
- To ask questions about completing this form, contact us toll-free at 800.418.2551 on business days from 8:00 a.m. to 5:00 p.m., Mountain Time.
- Return this form to: UESP, PO Box 145100, Salt Lake City, UT 84114-5100. For overnight delivery, send to: UESP, Board of Regents Building, Gateway 2, 60 South 400 West, Salt Lake City, UT 84101-1284. You may also fax this form to 800.214.2956.

1 Account Owner/Agent Information

UESP Account Number (for UESP accounts set up online)

Account Owner's U.S. Social Security Number (Required)

OR

Taxpayer Identification Number (Required)

Account Owner/Agent's Last Name

First Name

Middle Name

2 Signature Authorization

- By signing below,
- I certify that I have received, read, understand, and agree to all the terms and conditions in the Program Description and Account Agreement. I will retain a copy of both documents for my records.
- I understand the Utah Educational Savings Plan requires my name, U.S. Social Security or Taxpayer Identification number, and signature in order to verify my identity.
- I certify that the information provided on this form is true and accurate.



Signature of Account Owner/Agent

Date (mm/dd/yyyy)

Name of Account Owner/Agent (please print)

Title (if signed on behalf of a trust, corporation, or other institution)