



For UESP Use Only	○
UESP Account _____	
Date Received/Initials _____	
Date Processed/Initials _____	

Form 225

Wire Transfer Notification

- Use this form to notify UESP of a one-time wire transfer contribution into your UESP account(s).
- **Wire transfers must be initiated by the contributor at their own financial institution.** Only wire transfers from a checking or savings account can be accepted.
- **A UESP account must be established before funds can be wire transferred.** UESP offers three types of accounts to save for the future qualified higher education expenses of a beneficiary: individual, institutional, or custodial. For complete definitions and descriptions, see the *Program Participation Information* section of the Program Description.
 - Individual 529 Account*—An account opened by an adult (i.e., a person at least age 18). This is the most common UESP account type and can be opened online or by submitting an Individual Account Agreement (form 100).
 - Institutional 529 Account*—An account opened by an institution such as a trust, corporation, or other organization. It can only be opened by submitting the Institutional Account Agreement (form 102).
 - Custodial 529 Account*—An account that may **only** be funded with liquidated assets from an existing Uniform Gifts to Minors Act/Uniform Transfers to Minor Act (UGMA/UTMA) custodial account. It can only be opened by submitting the Custodial Account Agreement (form 104).
- A custodial account may **only** be funded with liquidated assets from an existing Uniform Gifts to Minors Act (UGMA) or Uniform Transfer to Minors Act (UTMA) custodial account. Please provide documentation that indicates the funds are UGMA/UTMA.
- **Before performing a wire transfer, you must receive confirmation from UESP that your account has been opened.**
- This form is required in addition to wire transfer forms that your financial institution may require. UESP cannot accept wire transfers without this form.
- For each wire transfer, a \$15 fee will be charged to your UESP account(s) on the day of the transfer (pro-rated for multiple accounts).
- Please print clearly—preferably in capital letters, using black or blue ink.
- If you have 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.

1 Contributor Information

Sender's Name _____	Sender's Daytime Phone _____
Financial Institution Name _____	Financial Institution Account Number _____
	Total Amount of Wire Transfer _____

2 Account Information

UESP Account Number _____	Account Owner/Agent's Last Name _____	First Name _____	
	Beneficiary's Last Name _____	First Name _____	Amount to post to this account _____
			\$
UESP Account Number _____	Account Owner/Agent's Last Name _____	First Name _____	
	Beneficiary's Last Name _____	First Name _____	Amount to post to this account _____
			\$
UESP Account Number _____	Account Owner/Agent's Last Name _____	First Name _____	
	Beneficiary's Last Name _____	First Name _____	Amount to post to this account _____
			\$

3 Wire Instructions

- Your financial institution will require specific information from UESP to complete this transfer. To obtain this information, contact us toll free at 800.418.2551 on business days from 8:00 a.m. to 5:00 p.m., Mountain Time.
- Send this form to: UESP, PO Box 145100, Salt Lake City, UT 84114-5100. For delivery by overnight carrier, 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.

Attach additional forms if the number of UESP accounts to be credited exceeds the space available.