



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 225

Wire Transfer Notification

For UESP Use Only	O
UESP Account _____	
Date Received by UESP _____	
User Initials _____	

- 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.
- If you have not yet opened a UESP account, you must submit an Account Agreement (form 100) or open an account online at www.uesp.org. Before submitting this form, 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 (including area code) _____
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
UESP Account Number _____	Account Owner/Agent's Last Name _____	First Name _____	
	Beneficiary's Last Name _____	First Name _____	\$ _____ Amount to post to this account

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

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.