



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



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

Form 515

Primary/Secondary Successor Owner Designation or Change

- Complete this form to designate, add, or change the current primary or secondary successor owner on your individual UESP account. You may also make these changes using UESP's online Account Access at www.uesp.org.
- If your account is custodial or institutional, you may not designate a successor account owner.
- Successors must be a U.S. citizen or resident alien, 18 years of age or older, and have a valid U.S. Social Security or Taxpayer Identification Number.
- 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 and any required documentation 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 _____	Account Owner's U.S. Social Security Number (Required) _____	OR	Taxpayer Identification Number (Required) _____
Account Owner Last Name _____	First Name _____		Middle Name _____
Account Agent Name (if different) _____			

2 Primary Successor Designation or Information Change

- To designate an individual as your primary successor or to change your current primary successor's information, fill out part A. To designate an institution as your primary successor or to change the institution's information, fill out part B.
- The successor/agent must be a U.S. citizen or resident alien, be 18 or older, and have a valid U.S. Social Security or Taxpayer Identification Number.

A. Primary Successor is an Individual

This is a name change due to marriage or divorce. I have attached legal documentation (e.g., marriage license).

U.S. Social Security Number (Required) _____	OR	Taxpayer Identification Number (Required) _____
Last Name _____	First Name _____	Middle Name _____
Date of Birth (mm/dd/yyyy) _____		

B. Primary Successor is an Institution (Trust or Corporation)

- To designate or change the primary successor as a trust, you must include a copy of the following pages of the trust document: the title page, signature pages, any pages showing the names of the trustees, and any pages showing the name of a successor trustee.
- To designate or change the primary successor as a corporation or other entity, you must include a copy of the appropriate documents from the institution to show who is authorized to enter into agreements for the institution, along with their signatures.
- The trustee or agent for the institution named below certifies that he or she has the authority and capacity to sign and enter into this agreement for the institution named.

Institution Identity

U.S. Social Security Number (Required) _____	OR	Taxpayer Identification Number (Required) _____
Name of Institution _____		

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Successor Account Agent

This is the person authorized to act on behalf of the institution.

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Last Name First Name Middle Name

Date of Birth (mm/dd/yyyy)

3 Secondary Successor Designation or Information Change

- To designate an individual as your secondary successor or change to your current secondary successor's information, fill out part A. To designate an institution as your secondary successor or to change the institution's information, fill out part B.
- The successor/agent must be a U.S. citizen or a resident alien, be 18 or older, and have a valid U.S. Social Security or Taxpayer Identification Number.

A. Secondary Successor is an Individual

This is a name change due to marriage or divorce. I have attached legal documentation (e.g., marriage license).

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Last Name First Name Middle Name

Date of Birth (mm/dd/yyyy)

B. Secondary Successor is an Institution (Trust or Corporation)

- To designate or change the secondary successor as a trust, you must include a copy of the following pages of the trust document: the title page, signature pages, any pages showing the names of the trustees, and any pages showing the name of a successor trustee.
- To designate or change the primary successor as a corporation or other entity, you must include a copy of the appropriate documents from the institution to show who is authorized to enter into agreements for the institution, along with their signatures.
- The trustee or agent for the institution named below certifies that he or she has the authority and capacity to sign and enter into this agreement for the institution named.

Institution Identity

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Name of Institution

Successor Account Agent

This is the person authorized to act on behalf of the institution.

U.S. Social Security Number (Required) OR Taxpayer Identification Number (Required)

Last Name First Name Middle Name

Date of Birth (mm/dd/yyyy)

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4 Signature Authorization

By signing below,

- I understand that in the event of my death, the primary successor will assume ownership and control of the assets in the account (once he or she completes an Account Owner/Agent Change form [form 505]). If the primary successor is unable to assume or declines ownership, the secondary successor will assume ownership of the assets in the account (once he or she completes an Account Owner/Agent Change form [form 505]). If the secondary successor chooses not to accept this role, the beneficiary will become the account owner, and the account will become a custodial account.
- I understand that I am bound by the terms, rights, and responsibilities stated in the Program Description.
- I certify that the information 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)