



2009 Contribution and Other Year-End Deadlines

All transaction requests must be received in the UESP office or made online **before 5:00 p.m.** (Mountain Time) on the deadlines stated below. Be aware that pending transactions in your account(s) may affect the processing of additional requests. UESP's forms are available online at www.uesp.org or by calling 800.418.2551.



Contributions *automated* ▪ *check* ▪ *online* ▪ *payroll* ▪ *wire*

5:00 p.m. (Mountain Time) | Thursday | **December 31, 2009***

Other Deadlines

December 28

December 31

Internal Transfers *between existing UESP accounts*

Internal Transfer form (form 400)



Rollover Funds *from other 529 plans* ▪ *Coverdell ESAs*

Incoming Direct Rollover form (form 210)



New Accounts

online ▪ *Account Agreement (form 100)*



Option Changes *up to two per beneficiary in 2009*

online ▪ *Investment Option Change form (form 405)*



Withdrawal Requests

online ▪ *Withdrawal Request form (form 300)*



* Due to processing time requirements, contributions received during the final business days of 2009 might not be invested in the specified UESP account(s) until early January 2010 but will still count as a 2009 tax year contribution. If that is the case, the contribution will be reflected on your March 2010 quarterly statement. You can check the tax year of your contribution by viewing your account online at www.uesp.org.