



# NextGen 529<sup>TM</sup> Contribution Coupon



Account number	Date	Rollover contribution: Earnings portion <sup>1</sup>	(be)
Account owner's last name		Rollover contribution: Principal portion <sup>1</sup>	(br)
Account owner's first name		Contribution amount	(iyv)
NextGen 529 account beneficiary / Student name		Contribution amount	(iyv)
<b>Contributions by check:</b>			(iyv)
Enclose a check payable to: <b>NextGen 529 FBO (NextGen 529 Account Number)</b> If the individual making a contribution is not the account owner, refer to the information below regarding third-party contributions. <sup>1</sup>		Contribution amount	(iyv)
* You must complete a Section 529 — Qualified Tuition Program Incoming Rollover Request Form and provide appropriate documentation concerning the principal and earnings portions of your contributions.		Contribution amount	(iyv)
Remit contribution to: Merrill Edge PO Box 962 Newark, NJ 07101		Contribution subtotal	
		<b>Deposit total<sup>2</sup></b>	

### IMPORTANT INFORMATION

Contributions resulting from a rollover to another state's Section 529 Plan, Coverdell Education Savings Account, Series EE or I Bond deposits must be accompanied by a NextGen 529 Incoming Rollover Form. To obtain this form, log into your account at [merrilledge.com](http://merrilledge.com).

<sup>1</sup> **Third-Party Contributions:** Persons other than the account owner who make contributions will have no subsequent control over the funds contributed to a NextGen 529 account. Only the NextGen 529 account owner will receive confirmation of account transactions and may direct transfers, rollovers, investment changes, withdrawals and change the account beneficiary (as permitted under federal law). Third-party contributors may subject NextGen 529 account owners to tax consequences. NextGen 529 account owners and third-party contributors should consult their tax advisors to discuss income or gift tax consequences.

<sup>2</sup> **Contribution Limit:** The aggregate NextGen 529 account balance limit is \$475,000 per Designated Beneficiary (subject to adjustments periodically).

*NextGen 529 is a Section 529 plan administered by the Finance Authority of Maine. Before you invest in NextGen 529, request a NextGen 529 Program Description and Participation Agreement from us and read it carefully. The Program Description contains more complete information, including investment objectives, charges, expenses and risks of investing in NextGen 529, which you should carefully consider before investing. You also should consider whether your home state or your designated beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in such state's 529 plan. Merrill Lynch, Pierce, Fenner & Smith Incorporated is the program manager, underwriter and distributor for the NextGen Plan.*



NextGen 529 is a registered trademark of the Finance Authority of Maine.

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Investment products:

<b>Are Not FDIC Insured</b>	<b>Are Not Bank Guaranteed</b>	<b>May Lose Value</b>
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