



## 2 Contribution Instructions (continued)

**Amount you will be contributing by direct deposit each pay period (on an after-tax basis):**

The minimum contribution is \$15 per Investment Option, per Beneficiary, per pay period.

Contribution Amount per pay period:	\$		,			.	0	0
-------------------------------------	----	--	---	--	--	---	---	---

**Tell the Plan how to allocate your contributions among Investment Options and/or Beneficiaries.**

Use only one form to contribute to all Account(s) for all Beneficiaries. Attach an additional sheet of paper, if needed.

Beneficiary Name (Provide first and last name.)	Investment Options (Enter Inv. Option code from below.)	Check if new Investment Option	Percentage of each contribution
1.		<input type="checkbox"/> New Option	. 0 0 %
2.		<input type="checkbox"/> New Option	. 0 0 %
3.		<input type="checkbox"/> New Option	. 0 0 %
4.		<input type="checkbox"/> New Option	. 0 0 %
5.		<input type="checkbox"/> New Option	. 0 0 %
6.		<input type="checkbox"/> New Option	. 0 0 %
<b>Total Allocation Per Pay Period</b>			<b>1 0 0 . 0 0 %</b>

## 3 Account Owner Authorization and Signature (You must sign exactly as your Account is registered.)

By signing below, I certify that I have read the Plan Disclosure Booklet and that I understand the terms in it and the Participation Agreement contained in the Plan Disclosure Booklet.

--	--

Account Owner Signature

Date

### Employee Checklist

- ✓ Be sure to include the name and Investment Option selection for **each** Beneficiary listed on this form in Section 2, and that **each** Beneficiary listed has an Edvest account (or you have enclosed an account application(s) along with this form).
- ✓ This form will be rejected by Edvest in its entirety if your total allocation in Section 2 does not equal 100%.
- ✓ Use the list below to select one or more of the following Investment Options for each Account you own:

Investment Option Names (Investment Option code)		
Age-Based Option (Age-Based)	Active-Based Moderate Portfolio (3434)	Bond Index Portfolio (3441)
Aggressive Age-Based Option (Agg Age-Based)	Active-Based Conservative Portfolio (3435)	U.S. Equity Active Portfolio (3442)
Index-Based Aggressive Portfolio (3427)	Balanced Portfolio (3437)	Social Choice Portfolio (3444)
Index -Based Moderate Portfolio (3429)	Large-Cap Stock Index Portfolio (3438)	Bank CD Portfolio (3445)
Index-Based Conservative Portfolio (3430)	Small-Cap Index Portfolio (3439)	Principal Plus Interest Portfolio (3446)
Active-Based Aggressive Portfolio (3432)	International Equity Index Portfolio (3440)	

- ✓ The Employee must be the Account Owner of all Account(s). You cannot contribute into an Account owned by your spouse, or by anyone else.
- ✓ **Mail the original copy of this form to the Plan.** It may take up to 10 days from the receipt of this form before a Direct Deposit can be accepted.
- ✓ **Complete and submit the UW Direct Deposit of Payroll form to your Human Resources office** (see instructions on page 1).
- ✓ **You may want to confirm receipt of this form by Edvest before you submit the UW Direct Deposit of Payroll form to your Human Resources office.**
- ✓ **Questions? Or to confirm receipt of this form by the Edvest,** call toll-free at 1.888.338.3789 (Mon – Fri from 7 a.m. – 7 p.m. CT).

**Mail this form to:**

**Overnight Mail**  
Edvest College Savings Plan  
430 W 7<sup>th</sup> Street, Suite 219437  
Kansas City, MO 64105-1407

**Regular Mail**  
Edvest College Savings Plan  
P.O. Box 219437  
Kansas City, MO 64121-9437

