MI529advisor

Additional Contribution by Mail Form

For Investors Utilizing a Financial Advisor
Questions? Call 1-866-529-8818
Monday - Friday 8:30 a.m. – 6:00p.m. ET

Instructions

- This form is for existing Account and may be used to purchase additional units (Classes A and C) of the MI 529 Advisor Plan (MAP).
- You must complete an Account Application to open an Account for another Account Owner and/or Designated Beneficiary.
- Mail this form to the Plan along with your contribution check(s) payable to MI 529 Advisor Plan.

1 Account Information *(Refer to your Account statement.)*

MAP Account Number (Please complete one form for each Account)

Telephone Number

Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name

Designated Beneficiary Name (First, MI, Last, Suffix)

2 Contribution Check Information

Make checks payable to, or endorsed to, the *MI 529 Advisor Plan*

Contributions are permitted by personal checks (excluding temporary/starter checks), bank drafts, teller's checks and cashier's checks payable to the MI 529 Advisor Plan are accepted. Checks issued by a financial institution or brokerage firm, and third-party personal checks up to $10,000, payable to you and endorsed over to the MI 529 Advisor Plan are also accepted. Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts in the Program for the same Beneficiary to exceed the Maximum Contribution Limit. Please refer to the Disclosure Booklet for more information

A note about Uniform Gift to Minors/Uniform Transfers to Minors Accounts (UGMA/UTMA):
If your contribution check represents proceeds from an UGMA/UTMA account, those funds can only be deposited into another UGMA/UTMA account for the same Beneficiary, subject to applicable law governing such accounts.

☐ ***Check***
Indicate the amount of your contribution into the selected Investment Portfolio(s) below and enclose your contribution check(s), payable to the MI 529 Advisor Plan with this Additional Contribution by Mail Form.

☐ ***Indirect Rollover***
To rollover the proceeds you received from a withdrawal from another qualified tuition program or Coverdell Education Savings Account, or from the redemption of qualified U.S. Savings Bonds, submit a check for the amount along with this form. The check must be received within 60 days of the date of withdrawal or redemption to be eligible for rollover treatment. Provide the breakdown of cost basis and earnings in the box below and submit a statement from your former qualified tuition program with these amounts along with this form.

☐ ***Proceeds are from the withdrawal of a Coverdell Education Savings Account (Coverdell ESA)***
Please provide the rollover amount and a breakdown of cost basis and earnings below. Please also submit with this form a statement from the applicable financial institution that shows the earnings portion of the withdrawal.

☐ ***Proceeds are from the redemption of a qualified U.S. savings bond***
Please provide the rollover amount and a breakdown of cost basis and earnings below. Please also submit with this Additional Contribution by Mail a Form 1099 issued by the financial institution that redeemed the bond showing interest paid on the redeemed bond.

Cost Basis	$, .
Earnings	$, .
Total Indirect Rollover Amount	$, .

Note: Unless MAP receives an account statement (or Form 1099 – INT for proceeds from a qualified U.S. savings bond), including a breakdown of cost basis and earnings or interest for your QTP rollover, Coverdell ESA account withdrawal, or qualified U.S. savings bond redemption, as applicable, the entire amount will be treated as earnings and will be reported to the IRS as earnings upon withdrawal.

3 Contribution Instructions (You must complete this section or your contribution will be rejected).

☐ **Deposit my check(s) based on my current allocation instructions on file**. *(Do not provide instructions in Section 4).*

☐ **Override Allocation Instructions**. *(By selecting override, this contribution will be based on the allocation instructions you provide in Section 4). This will NOT affect your existing allocations (if any) currently on file.*

4 Investment Portfolio Information

You may direct your contribution to an existing Investment Portfolio or into a new Investment Portfolio, which will be opened upon receipt of this contribution. The minimum contribution is $25 per Investment Option. See the *Disclosure Booklet* for more information including the Maximum Contribution Limit.

Select the Class of Units to be purchased:

- ☐ Class A Units with initial sales charge.
- ☐ Class C Units with contingent deferred sales charge.
- ☐ Class A Units with waived initial sales charge. *(Please indicate reason below.)*
  - ☐ Current or retired employee or director of eligible dealer/firm, or immediate family member of any such person *(identify dealer/firm below)*
  - ☐ Fee-based Account
  - ☐ Employee of Selling Institution or immediate family member of any such person *(identify dealer/firm below)*: By checking this box, I certify that I am an employee for at least the last 90 days of a Selling Institution, or an immediate family member of any such person, and therefore qualify to purchase Class A Units at Net Unit Value as outlined in the Disclosure Booklet and the Participation Agreement.

Dealer/Firm Name

Select Portfolios to be purchased:

Investment Portfolios			**Contribution Amount(s)**
Share Class and Fund	***Class A***	***Class C***	
Age-Based Investment Portfolio	*Age-Based*	*Age-Based*	$, .
Capital Appreciation Portfolio	*Fund 6518*	*Fund 6519*	$, .
Conservative Allocation Portfolio	*Fund 6520*	*Fund 6521*	$, .
Oakmark International Portfolio	*Fund 6522*	*Fund 6523*	$, .
Santa Barbara Dividend Growth	*Fund 6524*	*Fund 6525*	$, .
Harding Loevner Global Equity	*Fund 6526*	*Fund 6527*	$, .
Nuveen Strategic Income Portfolio	*Fund 6528*	*Fund 6529*	$, .
Nuveen Inflation-Linked Portfolio	*Fund 6530*	*Fund 6531*	$, .
Principal Plus Interest Portfolio	*Fund 6532*	*Fund 6533*	$, .
MetWest Total Return Bond Portfolio	*Fund 6534*	*Fund 6535*	$, .
TIAA Large Cap U.S. Equity Index Portfolio	*Fund 6536*	*Fund 6537*	$, .
TIAA U.S. Small Cap Portfolio	*Fund 6538*	*Fund 6539*	$, .
TIAA Large Cap Value Portfolio	*Fund 6540*	*Fund 6541*	$, .
Harbor Capital Appreciation Portfolio	*Fund 6542*	*Fund 6543*	$, .
Ariel Portfolio	*Fund 6544*	*Fund 6545*	$, .
DFA Emerging Markets Portfolio	*Fund 6546*	*Fund 6547*	$, .
Nuveen Alternative Income Portfolio	*Fund 6548*	*Fund 6549*	$, .
TIAA Social Choice Equity Portfolio	*Fund 6550*	*Fund 6551*	$, .
TIAA Social Choice Bond Portfolio	*Fund 6552*	*Fund 6553*	$, .
Nuveen Real Asset Income Portfolio	*Fund 6554*	*Fund 6555*	$, .
		TOTAL	$, .

Mail This Form To:
Via regular mail:

MI 529 Advisor Plan
PO Box 219295
Kansas City, MO 64121-9295

Via overnight courier:

MI 529 Advisor Plan
c/o DST
430 W 7th Street Suite 219295
Kansas City, MO 64105-1407