DO NOT STAPLE

Brighter Future Advisor Plan

Additional Contribution Form

BRIGHTER FUTURE
529 ADVISOR PLAN

- Complete this form to make additional contributions to your Brighter Future Advisor Plan account by check.
- For your contribution to be invested, you must clearly print all required information and include a check payable to: ***Brighter Future Advisor Plan***. Otherwise, your investment may be delayed until proper information is received.
- Print clearly, preferably in capital letters and black ink.

Note: Your contribution will be invested according to the standing allocation instructions on file for your account at the time this form is received in good order.

Forms can be downloaded from our website at **www.brighterfutureadvisor529.com**, or you can call us to order any form – or request assistance in completing this form at **1.888.529.9552** any business day from 8:30 a.m. to 6:30 p.m. ET.

Mail this form and any other required documents to:

Brighter Future Advisor Plan
P.O. Box 219700
Kansas City, MO 64121-9700

For overnight delivery or registered mail, send to:

Brighter Future Advisor Plan
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

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Account Number (Include your account number on your check.)

Name of Account Owner (first, middle initial, last)

Name of Designated Beneficiary (first, middle initial, last)

Source of Funds. Your additional contributions must be at least $50.

A. ☐ Personal check. Important: All checks must be made payable to: ***Brighter Future Advisor Plan.***

$ ☐☐☐,☐☐☐.☐☐
Amount

B. ☐ Indirect rollover from another qualified 529 plan, an education savings account (ESA), or qualified U.S. savings bond.

- **Indirect rollover from another qualified 529 plan or an ESA:** Enclose documentation from the distributing financial institution detailing a breakdown of contributions and earnings.
- **Indirect rollover from qualified U.S. savings bonds:** Please attach a statement or IRS Form 1099-INT issued by the distributing financial institution that shows the interest paid upon redemption.

Important: If you do not provide this documentation, the entire amount will be considered earnings, which could result in adverse tax consequences, particularly if you later make a non-qualified distribution from your Brighter Future Advisor Plan account.

$ ☐☐☐,☐☐☐.☐☐
Contributions

$ ☐☐☐,☐☐☐.☐☐
Earnings

$ ☐☐☐,☐☐☐.☐☐
Amount

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