SMART529 WV Direct

Payroll Direct Deposit Form

SMART529 is a program of the West Virginia College Prepaid Tuition and Savings Program Board of Trustees and is administered by Hartford Funds Management Company, LLC

- Complete this section to add, change, or delete Payroll Direct Deposit instructions on your SMART529 WV Direct Account(s). You may also provide your Payroll Direct Deposit instructions when you log on to our website at **www.SMART529.com.** *(If you have not established an Account, you must also complete and enclose an **Account Application.**)*
- After we process this form, you will receive a **Payroll Direct Deposit Confirmation Form,** which you must sign and submit to your employer's payroll department.
- Your Payroll Direct Deposit instructions will not take effect until your employer has accepted your signed form.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address below, or return by fax at **1.877.486.9270**. Do not staple.

Fillable forms can be downloaded from our website at **www.SMART529.com,** or you can call us to order any form — or request assistance in completing this form — at **1.866.574.3542**, Monday – Thursday 8 a.m. to 7 p.m. Eastern time and Friday 8 a.m. to 6 p.m. Eastern time.

Return this form and any other required documents to:
SMART529 WV Direct
P.O. Box 55362
Boston, MA 02205-5362

For overnight delivery or registered mail, send to:
SMART529 WV Direct
95 Wells Ave., Suite 155
Newton, MA 02459-3204

1. Account Owner information

☐☐☐☐☐☐☐☐☐ – ☐☐
Account Number

☐☐☐ – ☐☐ – ☐☐☐☐
Social Security Number or Taxpayer Identification Number ***(Required)***

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

☐☐☐ – ☐☐☐ – ☐☐☐☐
Telephone Number *(In case we have a question about your Account.)*

2. Payroll Direct Deposit instructions

Check one: ☐ Add Payroll Direct Deposit ☐ Change Amount ☐ Delete Payroll Direct Deposit *(Skip to **Section 3.**)*

Deduct $ ☐,☐☐☐.0 0 from my paycheck each pay period and allocate the amount among my SMART529 WV Direct Account(s) as detailed below.

☐ **Important:** Check here if you are an employee of the State of West Virginia.

State Agency/Department

Important: There is no minimum subsequent contribution. Please use an additional sheet if you have more than 3 Accounts.

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

☐☐☐☐☐☐☐☐☐ – ☐☐ $ ☐,☐☐☐.0 0

Account Number Dollar Amount

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

3. Signature — YOU MUST SIGN BELOW

I certify that I have read and understand, consent, and agree to all the terms and conditions of the SMART529 WV Direct College Savings Plan Offering Statement and understand the rules and regulations governing SMART529 WV Direct.

SIGNATURE

Signature of Account Owner

☐☐ – ☐☐ – ☐☐☐☐

Date *(mm/dd/yyyy)*

Clear all fields

West Virginia College Prepaid Tuition and Savings Program Board of Trustees