

2018 Schedule OR-529



Office use only

Oregon 529 College Savings Plan Direct Deposit for Personal Income Tax Filers

Submit original form—do not submit photocopy.

Form with fields for First name and initial, Last name, Social Security number (SSN), Spouse's first name and initial, Spouse's last name, Spouse's SSN.

Would you like to deposit all or a portion of your refund into an Oregon 529 college savings plan account? If so, follow the instructions below.

Requirements

- To make this choice, you must have an open Oregon 529 college savings plan account. For more information, see contact information below.
Deposits must be a minimum of \$25 per account.
If your refund is used to pay a debt you owe or the amount you elect to deposit exceeds your available refund, your deposit will be cancelled. Any remaining refund will be refunded by check or direct deposit.

Instructions

You may deposit all or a portion of your refund in up to four accounts. Complete all the fields below for each account.

- Select the account manager—Oregon College Savings Plan or MFS 529 Savings Plan;
For MFS 529 Savings Plans only, enter the four-digit portfolio number—contact your account manager about portfolio options;
Enter the account number—11 digits for MFS 529 Savings Plan or 13 digits for Oregon College Savings Plan;
Enter the amount to be deposited into each account; and
Total the amounts to be deposited.

1. Check one: 1a. [ ] Oregon College Savings Plan; or 1b. [ ] MFS 529 Savings Plan
1c. Portfolio no. [ ] 1d. Account no. [ ] 1e. Amount \$ [ ] .00

2. Check one: 2a. [ ] Oregon College Savings Plan; or 2b. [ ] MFS 529 Savings Plan
2c. Portfolio no. [ ] 2d. Account no. [ ] 2e. Amount \$ [ ] .00

3. Check one: 3a. [ ] Oregon College Savings Plan; or 3b. [ ] MFS 529 Savings Plan
3c. Portfolio no. [ ] 3d. Account no. [ ] 3e. Amount \$ [ ] .00

4. Check one: 4a. [ ] Oregon College Savings Plan; or 4b. [ ] MFS 529 Savings Plan
4c. Portfolio no. [ ] 4d. Account no. [ ] 4e. Amount \$ [ ] .00

Add lines 1–4. Enter this amount on your return. Total \$ [ ] .00

Contact information

Oregon 529 Savings Network
www.oregon529network.com
Phone: (503) 373-1903
Email: college.savings@ost.state.or.us

Oregon College Savings Plan
www.oregoncollegesavings.com
Phone: 1 (866) 772-8464

MFS 529 Savings Plan
www.mfs.com
Phone: 1 (866) 529-1637

— You must include this schedule with your Oregon income tax return to have your refund applied —