

2020 Schedule OR-529

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(Rev. 08-17-20 ver. 01)

Oregon Department of Revenue



Office use only

Oregon College Savings Plan Direct Deposit and Account Creation Election for Personal Income Tax Filers

Submit original form—do not submit photocopy.

First name	Initial	Last name	Social Security number (SSN)
			— —
Spouse's first name	Initial	Spouse's last name	Spouse's SSN
			— —

Part 1: Oregon College Savings Plan Direct Deposit.

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

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

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

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

Total. Add lines 1e–4e. Enter this amount on your return **Total \$**

Part 2: Oregon College Savings Plan Account Creation Election.

Taxpayer's email

Beneficiary's first name		Beneficiary's last name
Relationship code (Relationship of beneficiary to taxpayer):	Date of birth (mm/dd/yyyy)	Social Security number (SSN)
	/ /	— —
Beneficiary's address (no PO Box)		
City	State	ZIP code

Sign here. I authorize the Department of Revenue to release information to the Oregon 529 Savings Board for the purpose of establishing an Oregon College Savings Plan Account.

Taxpayer's signature	Date
X	/ /