

2021 Schedule OR-529

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

Page 1 of 2 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

Grid for last name input

Grid for Social Security number input

Instructions. Use this schedule to deposit your refund in up to four existing Oregon College Savings Plan or MFS 529 Savings Plan accounts or to elect to share your information with the Oregon 529 Savings Board for the purpose of establishing an Oregon College Savings Plan account. For more information, see Schedule OR-529 Instructions.

Part 1: Oregon College Savings Plan Direct Deposit.

1. Check one: 1a. [ ] Oregon College Savings Plan; or 1b. [ ] MFS 529 Savings Plan

1c. Portfolio number 1d. Account number

Grids for portfolio and account numbers for line 1

1e. Amount.....1e. [ ] [ ] [ ] , [ ] [ ] [ ] , [ ] [ ] [ ] . 0 0

2. Check one: 2a. [ ] Oregon College Savings Plan; or 2b. [ ] MFS 529 Savings Plan

2c. Portfolio number 2d. Account number

Grids for portfolio and account numbers for line 2

2e. Amount.....2e. [ ] [ ] [ ] , [ ] [ ] [ ] , [ ] [ ] [ ] . 0 0

3. Check one: 3a. [ ] Oregon College Savings Plan; or 3b. [ ] MFS 529 Savings Plan

3c. Portfolio number 3d. Account number

Grids for portfolio and account numbers for line 3

3e. Amount.....3e. [ ] [ ] [ ] , [ ] [ ] [ ] , [ ] [ ] [ ] . 0 0

4. Check one: 4a. [ ] Oregon College Savings Plan; or 4b. [ ] MFS 529 Savings Plan

4c. Portfolio number 4d. Account number

Grids for portfolio and account numbers for line 4

4e. Amount.....4e. [ ] [ ] [ ] , [ ] [ ] [ ] , [ ] [ ] [ ] . 0 0

5. Total. Add lines 1e-4e. Enter this amount on your return..... 5. [ ] [ ] [ ] , [ ] [ ] [ ] , [ ] [ ] [ ] . 0 0



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Part 2: Oregon College Savings Plan Account Creation Election.

Taxpayer email

[Grid for taxpayer email]

Beneficiary first name

[Grid for beneficiary first name]

Initial

[Grid for beneficiary initial]

Beneficiary last name

[Grid for beneficiary last name]

Beneficiary Social Security number (SSN)

[Grid for beneficiary SSN]

Beneficiary date of birth (MM/DD/YYYY)

[Grid for beneficiary date of birth]

Relationship code (see instructions):

[Grid for relationship code]

Beneficiary address (no PO Box)

[Grid for beneficiary address]

City

[Grid for beneficiary city]

State

[Grid for beneficiary state]

ZIP code

[Grid for beneficiary 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

X [Signature line]

Date (MM/DD/YYYY)

[Grid for taxpayer date]

— You must include this schedule with your Oregon income tax return —

