

### INSTRUCTIONS

Use this form to request the redeposit of 529 funds that were previously withdrawn from your Virginia529<sup>SM</sup> Account.

To avoid certain tax consequences and penalties: 1) the funds you wish to redeposit must have been refunded by your student's Eligible Educational Institution (refunds from K-12 schools **are NOT** eligible for recontribution); 2) your refund must be redeposited within 60 days of the date of the refund; 3) you must redeposit the refund into a 529 account for the same student for whom the original Withdrawal was taken; 4) the portion of the refund you wish to redeposit must be a refund of Qualified Higher Education Expenses only; and 5) your redeposit amount cannot exceed the amount of the original Withdrawal from your Account.

### SECTION 1 | Account Information

Account Owner Name

Account Number(s)

Phone Number

Email Address

Amount Being Redeposited

Date of Refund

Date of Original Withdrawal

Amount of Original Withdrawal

I confirm by signature below that I have read the instructions and that the redeposit requested here meets all the criteria listed above.

### SECTION 2 | Remittance of Funds Options

Remittance of Funds Options (select one):  Check  ACH/Electronic Bank Transfer (Invest529 only)

#### Note:

- Invest529<sup>SM</sup> Account Owners may make a one-time ACH or electronic bank transfer through their online account and upload this form by selecting Upload Documents under the Help Desk tab.
- CollegeWealth<sup>®</sup> Account Owners will need to deposit the funds via the BB&T website or deposit in-person at a bank branch and submit this form to Virginia529 (9001 Arboretum Parkway, North Chesterfield, VA 23236)
- For check deposits, the check and this form should be mailed to one of the addresses below. Note the following:
  - Personal Checks:** Make checks payable to Virginia529 (include the Student's name and Account number).
  - Checks from the School:** Refund checks can be sent directly to Virginia529; write "**Payable to Virginia529 FBO**" (include the Student's name and Account number).

For **Invest529**, mail check and form to: Invest529 Payments; P.O. Box 719226, Philadelphia, PA 19171-9226

For **Prepaid529**, mail check and form to: Prepaid529 Payments; P.O. Box 719232, Philadelphia, PA 19171-9232

For **Tuition Track Portfolio** mail check and form to: Tuition Track Portfolio Payments; P.O. Box 716485, Philadelphia, PA 19171-6485

Account Owner Signature

Account Owner Printed Name

Date

Please provide your documents by logging into your Virginia529 account and selecting **Upload Documents** under the Help Desk tab. Please do not send personal identification documents by return email.