



Connecticut Higher Education Trust

Instructions

- Use this *Additional Contribution by Mail* form only to contribute to an existing Program Account. (You must complete an *Account Application* to open an Account for another Account Owner and/or Beneficiary.)
- A separate *Additional Contribution by Mail* form is required for each Account. You can obtain additional copies of this form, or any Program form, by calling the Program or by visiting www.aboutCHET.com and clicking on *Account Forms*.
- Print in capital letters using blue or black ink. Mail this form to the Program at the above address, along with your contribution check(s).

Connecticut Higher Education Trust Additional Contribution by Mail

Use this form to contribute to an existing Program Account
Questions? Call toll-free 1-888-799-CHET (1-888-799-2438)
P.O. Box 150499, Hartford, CT 06115-0499
Visit www.aboutCHET.com

1 Account Information

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Account Number (Provide any one from your statement.)

Account Owner or Custodian Name (First, MI, Last, Suffix), or Entity Name

Beneficiary Name (First, MI, Last, Suffix)

2 Contribution Check Information

Make check(s) payable to the Connecticut Higher Education Trust. Contributions are permitted by personal checks, bank drafts, teller's checks and checks issued by a financial institution or brokerage account payable to the Account Owner and endorsed to the Program by the Account Owner, and third-party personal checks up to \$10,000 endorsed to the Program by the Account Owner. Checks must be drawn on a U.S. banking institution and must be payable in U.S. dollars. Contributions will be rejected and returned to the extent that they cause the aggregate market value of all accounts for the same Beneficiary to exceed the Maximum Contribution Limit. Please refer to the *Disclosure Booklet* for the current Maximum Contribution Limit.

A note about Uniform Gift to Minors/Uniform Transfers to Minors Accounts (UGMA/UTMA):
If your contribution check represents proceeds from an UGMA/UTMA account, those funds can only be deposited into another UGMA/UTMA account for the same Beneficiary, subject to applicable law governing such accounts.

- Check**
Indicate the amount of your contribution into the selected Investment Option(s) below and enclose your contribution check(s), payable to the *Connecticut Higher Education Trust* along with this *Additional Contribution Form*.
- Indirect Rollover**
To roll over the proceeds from the redemption of another Qualified Tuition Plan account (QTP), indicate the amount you are contributing into the Investment Options in Section 3, and submit a check for the amount along with this form. The check must be received within 60 days of the date you received the withdrawal proceeds from the QTP account. *Provide the breakdown of cost basis and earnings in the box below and submit a statement from your former qualified tuition program with these amounts along with this form.*
- Proceeds from the withdrawal of a Coverdell Education Savings Account (Coverdell ESA)**
Indicate the amount you are remitting from your Coverdell Education Savings Account (Coverdell ESA) into the selected Investment Option(s) below, and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings below and submit an account statement with these amounts along with your check and this form.*
- Proceeds from the redemption of a qualified U.S. savings bond**
Indicate the amount you are remitting from the redemption of your qualified U.S. savings bond into the selected Investment Option(s) below and submit your check for the amount with this form. *Provide the breakdown of cost basis and earnings below and submit a Form 1099 with these amounts along with your check and this form.*

Cost Basis	\$												
Earnings	\$												
Total Indirect Rollover Amount	\$												

Note: Unless the Program receives an account statement (or Form 1099 – INT for proceeds from a qualified U.S. savings bond), including a breakdown of cost basis and earnings or interest for your QTP rollover, Coverdell ESA account withdrawal, or qualified U.S. savings bond redemption, as applicable, the entire amount will be treated as earnings and will be reported to the IRS as earnings upon withdrawal.

3 Investment Option Information *(You must complete this section or your contribution will be rejected.)*

- Deposit my check(s) based on my current allocation instructions on file.** (Do not provide instructions in Section 4).
- Override Allocation Instructions.** (By selecting override, this contribution will be based on the allocation instructions you provide in Section 4). This will NOT affect your existing allocations (if any) currently on file.

4 Investment Option Information

You may direct your contribution to an existing Investment Option or into a new Investment Option, which will be opened upon receipt of this contribution. The minimum contribution is \$25 per Investment Option. See the *Disclosure Booklet* for more information.

Investment Options <i>(Fund Code)</i>	Check if new Investment Option ¹	Contribution Amount(s)																		
Moderate Managed Allocation Option (Age based)	<input type="checkbox"/> New Option	\$																		
Aggressive Managed Allocation Option (Age based)	<input type="checkbox"/> New Option	\$																		
Conservative Managed Allocation Option (Age based)	<input type="checkbox"/> New Option	\$																		
Active Global Equity Option (2282)	<input type="checkbox"/> New Option	\$																		
High Equity Balanced Option (1955)	<input type="checkbox"/> New Option	\$																		
Global Equity Index Option (2251)	<input type="checkbox"/> New Option	\$																		
Social Choice Equity Option (2260)	<input type="checkbox"/> New Option	\$																		
Active Fixed Income Option (2253)	<input type="checkbox"/> New Option	\$																		
Index Fixed Income Option (2281)	<input type="checkbox"/> New Option	\$																		
Principal Plus Interest Option (1956)	<input type="checkbox"/> New Option	\$																		
U.S. Equity Index Option (2304)	<input type="checkbox"/> New Option	\$																		
International Equity Index Option (2305)	<input type="checkbox"/> New Option	\$																		
Global Tactical Asset Allocation Option (2306)	<input type="checkbox"/> New Option	\$																		
Money Market Option (2261)	<input type="checkbox"/> New Option	\$																		
Total Contribution Check(s)		\$																		

Note: If you allocate your contributions to the Principal Plus Interest Option transfers made at a later date from the Principal Plus Interest Option to the Money Market Option will not be permitted.

Mail this form to:

Connecticut Higher Education Trust
P.O. Box 150499
Hartford, CT 06115-0499



¹ If a new Investment Option is opened, a different option number will be assigned and new investment coupons will accompany your confirmation statement. You can also use the Additional Contribution by Mail form to contribute by check at any time.