

# Employee Payroll Direct Deposit Form



**The Education Plan®**  
Save today for your child's tomorrow

## Instructions

Please complete this form to establish, change or delete payroll direct deposit instructions on your existing The Education Plan® account(s).

If you are directing a contribution from payroll for a new account, complete and attach a separate application for each beneficiary.

Before completing this form, check with your payroll department regarding the availability of this service. Your payroll department must complete an *Employer Authorization Form - Payroll Direct Deposit* before you can begin payroll direct deposit.

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ● not ⊗ not ☑

If you have any questions about this form, please call **1.877.EdPlan8 (1.877.337.5268)**.

### 1 | Employee/Company Information

Employee's first name	Middle initial	Last name	Social Security number
( )			
Employee's phone number	Employee's email address		
Company name			( ) Company phone number
Company contact			

### 2 | Payroll Direct Deposit Information

- A.  Establish a new payroll direct deposit       Cancel existing direct deposit  
 Change allocation percentage

**B. Payroll Direct Deposit Amount**

Indicate the amount to be directed from your paycheck each pay period to your 529 account.

Total Direct Deposit Amount \$ \_\_\_\_\_

This dollar amount will be invested according to your Elected Investment Allocation on file at the time the assets are received. If you are establishing a new account, the assets will be invested according to your instructions on the Account Application.

All dollar allocations will be stored as percentages. Payroll dollars will be invested based on the stored percentages until the account owner submits a new form.

Account number	Beneficiary's name	Percentage of direct deposit to be allocated to each account (full % only)
		.00%
		.00%
		.00%
		.00%
<b>Total</b>		100.00%

*Continued on next page*



### 3 | Authorized Signature

Employee's Signature \_\_\_\_\_

Date \_\_\_\_\_

All Employees

Make two copies of this Employee Payroll Direct Deposit Form and retain a copy for your records:

1. Retain a copy for your records.
2. Provide a copy of this form to your Human Resources Department once you obtain your Education Plan account number so they can initiate the payroll direct deposit.
3. Your Human Resources Department will send a copy of the Form to The Education Plan® at:

The Education Plan®  
P.O. Box 173691  
Denver, CO 80217



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