



## Client Connect Series Gift Form

### Give the gift of a brighter future

A NextGen 529 Client Connect Series account makes it easy to plan, save, and invest for college. A gift contribution to a loved one's account can help a child or student save for their future education and reach their dreams, no matter how big they may be.

### How to make a gift:

- Fill out this form and include a check made payable to NextGen 529 FBO (Designated Beneficiary Name)
- There is no minimum.
- There is no fee to make a gift contribution using this form.
- If you have questions, please contact us Monday – Friday from 8am-8pm ET at 1-833-336-4529.
- Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.



### Gift Contribution Coupon

Participant/Account Owner name

Contributor's Name

Designated Beneficiary name

Contributor's address

NextGen 529 Client Connect Account Number

Contributor's phone number

\$

Gift amount (No minimum)

Mail this form and check to:

NextGen 529  
PO Box 534457  
Pittsburgh, PA 15253-4457

Overnight Mail:

NextGen 529  
Attention: 534457  
500 Ross Street, 154-0520  
Pittsburgh, PA 15262

Fax: 844-751-0017

Cut this part out and give it to the recipient. →

**Gift Certificate**

A gift of \$ \_\_\_\_\_

was made to \_\_\_\_\_'s

NextGen 529 Connect Series Plan account from \_\_\_\_\_.

\*Contribute to your Connect Series Account. This coupon is for Client Connect Series accounts. Visit [NextGenforME.com](http://NextGenforME.com) for information about making a contribution to a NextGen 529 account in a different series. Incoming Rollovers from another state's Section 529 plan, Coverdell Education Savings Account, Series EE or I Bond deposits must be accompanied by a NextGen 529 Incoming Rollover Form. Download this form at [NextGenforME.com](http://NextGenforME.com). Contribution limit: The aggregate NextGen 529 account balance limit is \$570,000 per Designated Beneficiary (subject to adjustment periodically). Third-party contributions: Persons other than the account owner who make contributions will have no subsequent control over the funds contributed to a NextGen 529 account. Only the NextGen 529 account owner will receive confirmation of account transactions and may direct transfers, rollovers, investment changes, withdrawals and change the account beneficiary (as permitted under federal law). Third-party contributors may subject NextGen 529 account owners to tax consequences. NextGen 529 account owners and third-party contributors should consult their tax advisors to discuss income or gift tax consequences. Investing is an important decision. The investments in your account may vary with market conditions and could lose value. Carefully read the Program Description in its entirety for more information and consider all investment objectives, risks, charges, and expenses before investing. For a copy of the Program Description, visit [NextGenforMe.com](http://NextGenforMe.com) or call 1-833-336-4529. Investments in NextGen 529 are not guaranteed or insured by the State of Maine, the Finance Authority of Maine (FAME), NextGen 529 service providers, any other state or federal agency, or any other party. Non-qualified withdrawals are subject to federal taxes and penalties and Maine state income tax. NextGen 529 does not provide legal, investment, financial aid, tax or other advice, and the information provided does not contain advice and cannot be construed as such or relied upon for those purposes. You should consult your own advisors. If you or your beneficiary are not Maine residents, your home state or that of your beneficiary may offer a 529 plan that provides state tax or other benefits, such as financial aid, scholarship funds, and protection from creditors, not available to you by investing in NextGen 529. You should consider such benefits, if any, before investing in NextGen 529. NextGen 529 is a Section 529 plan administered by FAME. Vestwell State Savings, LLC is the program manager, The Bank of New York Mellon is the program custodian, BlackRock Advisors, LLC is the program investment manager. Northern Lights Distributors, LLC, Member FINRA, is the Connect Series distributor.

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**Investment products are not FDIC insured, are not bank guaranteed, and may lose value.**



**Program Manager**



**Program Administrator**

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