

SECTION 4. PROJECTED BENEFIT USE YEAR (BUY)

In what academic year do you expect the Student Beneficiary to enter college and/or turn 18 years old? (This is referred to as the Projected Benefit Use Year. See Instructions, Chart A.)

Fall 2 0

SECTION 5. PLAN SELECTION – Select your plan. You may save through both plans.

<input type="checkbox"/> Lump Sum Plan		Custom Monthly Plan The Custom Monthly Payment Plan option is unavailable to new purchasers during the 2022-23 Enrollment Period.
A. Current Unit Purchase Price	\$116.63 (through June 30, 2023)	
Payments received after June 25, 2023 will purchase units after the new Unit Purchase Price is set in the fall.		
B. Total amount I am enclosing today for Lump Sum Units* (A x B = C).	\$	
Indicate if you would like a coupon book to purchase additional Units for your Account (Section 6 below).		

***PLEASE NOTE: We can only accept checks, money orders or electronic payments. We do not accept cash or credit/debit card payments.**

SECTION 6. PAYMENT OPTIONS – Please check all that apply:

- A. Yes, I want to initiate automatic monthly withdrawals from my bank account. I have completed the Automatic Withdrawal Authorization on page 4 of this enrollment form.
- B. Yes, I want to authorize deductions from my paycheck. I have completed the Payroll Deduction Authorization form found on GET's website wastate529.wa.gov/forms-get, and will give it to my payroll department. *View a list of participating GET Payroll Deduction Employers at wastate529.wa.gov/payroll-deduction.*
- C. Yes, I want to make payments by mailing a paper check, along with a payment coupon. Please send me a book of payment coupons with my specific Account information that I can include with each payment. *Access generic payment coupons at wastate529.wa.gov/forms-get.*
- D. Yes, I want others to contribute to my GET Account. I have completed the GiftoR Authorization form found on GET's website at wastate529.wa.gov/forms-get.

SECTION 7. ENROLLMENT FEE – Select one of the options below:

- A. I am enclosing my check or money order for my non-refundable \$50 enrollment fee (payment must be enclosed with enrollment form).
- B. I am not enclosing the \$50 enrollment fee because I believe I qualify for an enrollment fee waiver (see page 3 of the attached instructions). I understand that the GET Program has final authority to approve all enrollment fee waivers. I am providing the GET Account numbers (or SSNs if you are opening the other Accounts today and do not have Account numbers yet) for the Accounts where the Account Owner is the same, the Student Beneficiaries all live at the same address, and the \$50 enrollment fee has already been paid on at least two of the Accounts. Accounts that have been refunded, canceled, or rolled over to another 529 plan are not included as eligible Accounts.
1. GET Account/SSN # _____ Student Beneficiary Name _____
2. GET Account/SSN # _____ Student Beneficiary Name _____

SECTION 8. ACCOUNT OWNER'S SIGNATURE – REQUIRED

By signing this enrollment form I agree to the following:

- I have completed all required sections of this form and certify that the information provided is true and accurate to the best of my knowledge.
- I have read, fully understand, and agree to all the terms and conditions of the Master Agreement and the Program Details Booklet and acknowledge that penalties and fees may apply for Account cancellation/termination.
- I certify that the Student Beneficiary and/or Account Owner is a resident of Washington State.

Signature of Account Owner (or Legal Guardian if under 18 years of age) or Trustee/Authorized Representative

X

Date

SECTION 10. DEMOGRAPHIC INFORMATION

Student Beneficiary's Relationship to Account Owner: Child Grandchild Guardianship Not Related/Friend Other Relative
 Self Decline to Answer

Account Owner's Race/Ethnicity: Alaska Native American Indian Asian Black Hispanic/Latinx
 Native Hawaiian or Other Pacific Islander White Other Race Decline to Answer

Annual Household Income: Under \$10,000 \$10,000-\$14,999 \$15,000-\$24,999 \$25,000-\$34,999 \$35,000-\$49,999
 \$50,000-\$64,999 \$65,000-\$74,999 \$75,000-\$99,999 \$100,000-\$149,999 \$150,000-\$199,999 \$200,000 and up
 Decline to Answer

Account Owner's Education (highest grade completed): High School/GED Some College Associate Degree Bachelor's Degree
 Master's Degree Doctoral Degree Other Educational Experience Decline to Answer

SECTION 11. AUTOMATIC WITHDRAWAL AUTHORIZATION (ACH) – Optional (This can be set up online)**Bank Account Holder:**

First Name Middle Last Suffix (Jr., etc.)

SSN/TIN (Required)**Gender**

- Male
 Female
 X/Non-binary

Date of Birth (MM/DD/YYYY) (Required)

Mailing Address Check here if you want to use the same address as listed in the Contact Information in Section 2.

City

State

Zip

Email

Home phone #

Work phone #

ext.

Other phone #

(specify type)

Bank Account Type:

- Checking
 Savings

GET Account Type:

- Lump Sum

Automatic Withdrawal Amount \$ _____ (per month)

(See amount you listed in Section 5)

Lump Sum Only

Pull my payment on the _____ of each month

REQUIRED: Please TAPE a checking account voided check or a savings account deposit slip HERE. (Please do NOT staple.)

Do **not** attach a deposit slip for checking account withdrawals.

Please note that some financial institutions do not allow automatic withdrawal from savings accounts.

I hereby authorize the Guaranteed Education Tuition Program (GET) to initiate entries to my financial institution account indicated below and the financial institution indicated below to debit this same account. This authority remains in full force and effect until the GET office receives my written notification of its termination in such time and manner as to afford GET and the financial institution a reasonable opportunity to act on it. Revocation by notice to the financial institution is not sufficient. GET may cancel my ACH and notify me in writing of such cancellation. Lump Sum withdrawals occur each month on the date I select above or on the next business day if my selected date falls on a weekend or holiday. If no date is specified for the Lump Sum withdrawal, the withdrawal will be scheduled to occur on the 15th day of the month. In the event of unsuccessful debits, I understand that GET reserves the right to assess this GET Account a returned ACH fee of \$25.00 per returned ACH withdrawal or the actual bank fee charged, whichever is greater. I understand that GET will process my ACH request upon receipt of my signed authorization. GET will notify me in writing of the first expected ACH withdrawal date. However, by signing this form, I acknowledge that GET may begin withdrawals even if I do not receive written notification prior to the first withdrawal date.

By signing below, I acknowledge that I have read and agree to the above terms.

Signature of Bank Account Holder

X

Date

Please submit form to:

**Guaranteed Education Tuition
 PO Box 84824
 Seattle WA 98124-6124**

Newborn Enrollment Form June 2023 Instructions

- PLEASE PRINT OR TYPE ALL INFORMATION except your signature.
- Use this form to open an account outside of the normal enrollment period for a newborn (between birth and 12 months).
- Carefully read the GET Enrollment Guide and Program Details Booklet before enrolling in GET. Copies are available at the program website at wastate529.wa.gov/forms-get. If you need additional information or assistance in completing this enrollment form, please contact us at GETInfo@wsac.wa.gov or call TOLL-FREE 1.800.955.2318, 8 a.m. to 5 p.m., PT, Monday through Friday (except state holidays).
- Complete a separate enrollment form for each Student Beneficiary you enroll in the program.
- Complete all applicable sections of the enrollment form, or your account setup may be delayed.
- Sign and date your enrollment form.
- If you are enclosing a rollover payment from another 529 program, US Savings Bonds or a Coverdell Education Savings Account, enclose documentation (e.g., Account statement or other documentation) indicating the principal and earnings portion of the rollover amount. See the GET Master Agreement in the Program Details Booklet for further details.
- Pay the one-time \$50 enrollment fee per Student Beneficiary at the time of enrollment. A maximum of \$100 per family is charged where all Accounts have the same Account Owner, and the Student Beneficiaries live at the same address (refunded, canceled, and rolled over Accounts are not eligible). See specific instructions in Section 7 for more details. Note that you can enroll online during the open enrollment period to avoid this fee.
- Make checks payable to Guaranteed Education Tuition. You may write one check for both the enrollment fee and Lump Sum Units purchased.
- Submit form and payment to: Guaranteed Education Tuition, PO Box 84824, Seattle WA 98124-6124

A copy of the Student Beneficiary's Birth Certificate must be enclosed with this Enrollment Form.

Important Payment Information:

The GET Unit Price is \$116.63 per unit through June 30, 2023. Payments received after June 25, 2023 will purchase units after the new Unit Purchase Price is set in the Fall.

SPECIFIC INSTRUCTIONS:

Section 1 – Account Owner

The Account Owner is the individual responsible for payment and is the only one who may make changes to the Account. If the Account Owner is an individual person, complete the “Individual Account Owner” section. **ONLY ONE INDIVIDUAL CAN BE THE ACCOUNT OWNER.** If the Account Owner is a trust, corporation, non-profit or other entity type, complete the “Other Account Owner Type” section. The Account Owner **or** the Student Beneficiary must be a resident of Washington State to enroll in the program.

Individual Account Owners

Select the correct option and follow the instructions on the enrollment form.

Other Account Owner Types

Enter the legal name of the existing trust* (exactly as shown on your trust documents), corporation, non-profit or other legal entity type to be listed as the Account Owner. Enter the entity's Federal Employer Identification Number (EIN) or Taxpayer Identification Number (TIN). GET is required to obtain this information for federal tax reporting purposes.

*A trust must be previously established before being named as the Account Owner. Trust documentation is required within 30 days of establishing this Account. If you are unable to provide the trust documentation in its entirety, we require the pages that include the following: Full legal name of the trust, the tax identification number of the trust, and legal names of all trustees and their notarized signatures. Only one Trustee will be allowed on the Account to make changes or gain login information. All other Trustees named in the documentation can be added to the Account as Information Release Persons.

Section 2 – Contact Information

For Individual Account Owners: Enter the legal name of the Account Owner (one person only). Enter the Account Owner's Social Security number. GET is required to obtain this information for tax reporting purposes. Enter the Account Owner's date of birth, gender, mailing address, phone number(s), and email. Due to our Account login process, the Account Owner's email is required. It must be unique to this Account Owner as it is a primary identifier in the user authentication process.

For Other Account Owner Types: Enter the name of the individual who is authorized to sign on behalf of the entity. In the case of an existing trust, the Trustee is usually the Authorized Representative. A copy of trust documents verifying the Authorized Representative must be provided. In the case of a non-profit organization or corporation, an officer of the entity is usually considered the Authorized Representative.

Section 3 – Student Beneficiary

If the Student Beneficiary already has an Account with GET where you are listed as the Account Owner, and you wish to purchase more Lump Sum Units, you do not need to complete an additional enrollment form. Simply note on your payment coupon that this is a Lump Sum Unit purchase and mail it with the payment to: GET, PO Box 84824, Seattle WA 98124-6124. Please contact us at GETInfo@wsac.wa.gov or 1.800.955.2318 for further guidance.

If the Account Owner is also the Student Beneficiary for the new Account, write "SAME AS ACCOUNT OWNER" in Section 3 and skip to Section 4. Otherwise, enter the Student Beneficiary's legal name. Enter the Student Beneficiary's Social Security number. Social Security number is required at enrollment. GET is required to obtain this information for tax reporting purposes. Enter the Student Beneficiary's birth date, gender, mailing address, email and phone number(s). Student Beneficiary must be under 12 months old. Postmark must be on or before Student Beneficiary's first birthday.

Section 4 – Projected Benefit Use Year

Enter the academic year you expect the Student Beneficiary to enter college. See Chart A below.

CHART A – Student Beneficiary's Projected Benefit Use Year

<u>Student Beneficiary Age</u>	<u>Projected Benefit Use Year</u>
Born after August 31, 2022	Fall 2041
Born between September 1, 2021 and August 31, 2022	Fall 2040

Washington law requires a two-year wait before benefits may be used.

Section 5 – Plan Selection

Currently, only the Lump Sum Plan is available. The Custom Monthly Payment Plan option is unavailable to new purchasers during the 2022-23 Enrollment Period.

To select the Lump Sum Plan, check the appropriate box and provide the total amount you are enclosing with the enrollment form for these Units. You must purchase at least one Unit in addition to paying the application fee. **Note: we do not accept credit/debit cards for Unit purchases.**

Section 6 – Payment Options

The GET Program offers a variety of payment options including: automatic monthly bank withdrawals, payroll deduction, mailed paper check, and customer-directed bank transfers through our secure website. For more details about these options, please refer to our 2022-2023 Enrollment Guide. If you choose to send your payments by mail, you can request that we send you a coupon book for future payments. If you want to initiate any of other payment options, please check the appropriate boxes and submit the information required. **Note: We do not accept cash or credit/debit card payments.**

Section 7 – Enrollment Fee

The GET Program charges a one-time non-refundable \$50 enrollment fee per Student Beneficiary when you enroll using the paper form. If you are paying the enrollment fee by check or money order, check box A. **The enrollment fee is due at the time of enrollment.** You may qualify for an enrollment fee waiver if you meet the following criteria:

1. Are you the designated Account Owner for more than two active Accounts (not canceled, refunded, or rolled out) for Student Beneficiaries living at the same address? Yes No
2. Have you paid the maximum \$100 in enrollment fees on the Accounts in Question 1? Yes No

If you answered yes to both questions, you may qualify for an enrollment fee waiver. Check box B and provide the GET Account number (or SSN if you are opening the other Accounts today and do not have an Account number yet) and Student Beneficiary name for the Accounts where the \$50 enrollment fee has been paid. The enrollment fee waiver is subject to final approval by the GET Program.

Section 8 – Signature

The Individual Account Owner must sign the enrollment form. If the Account Owner is a minor (under the age of 18), the Legal Guardian must sign the form and complete Section 9, Part C.

For Other Account Owner Types, the individual authorized to sign on behalf of the entity must sign the form. In the case of a trust, the trustee is usually the Authorized Representative. In the case of a non-profit organization or corporation, an officer of the entity is usually considered the Authorized Representative.

Section 9 – Other Persons (Please Note: Only the Account Owner can make changes to the Account.)

Part A – Use this section to name an Account Owner Survivor for this Account. The Account Owner Survivor will become the owner of the Account upon the Account Owner's death. All rights and obligations of this agreement transfer to this Account Owner Survivor. If the listed Account Owner Survivor is also deceased or incapacitated the account will transfer to the Account Owner's estate. The Personal Representative or Executor of the estate will have full control of the account. Estate documents will be required listing a Personal Representative or Executor. **Note:** *If you want to authorize GET to release limited information to the Account Owner Survivor, check the box and they will be included as an Information Release. Contact the GET Program office for more information.*

Part B – You may authorize GET to release information regarding your Account to another person(s) such as a spouse, grandparent, or guardian. If you wish to authorize someone (in addition to the Account Owner) to receive limited inquiries on this Account, complete Part B. Please note that the program will only provide the login ID and PIN for online Account access to the Account Owner.

Part C – **Only complete this section if the Account Owner identified in Section 2 is less than 18 years old.** A Legal Guardian must be designated when the Account Owner is a minor. Please note that once the minor Account Owner reaches the age of 18, the Guardian will be removed from the Account and new contact/login information will be requested from the Account Owner.

Section 10 – Demographic Information

This information is optional. However, it does give the GET Program a better understanding of GET customers, which helps when considering improvements to the program. Demographic information is reported at the aggregate level; GET never shares individual Account demographic or contact information with any other entity.

Section 11 – Automatic Withdrawal Authorization – (Optional)

If you checked box A in Section 6, please complete this section. Completing this section authorizes GET to automatically withdraw money from your bank or credit union account and deposit it directly into your GET Account. Payments are deducted on a date you select for Lump Sum Plans. You can opt to purchase Lump Sum Units in this manner. Please provide information for the bank account holder. This person may be different than the person listed as the Account Owner on the Account but you must include the bank account holder's authorizing signature.