

NC 529 Contribution Deadlines for 2011

The end of a calendar year always brings a high volume of Contributions to the NC 529 Plan. That volume, the increase in holiday mail, and holiday schedules make it critical to make any Contribution you intend as a deductible item for your 2011 NC taxable income by at least early December. Even better -- make it sooner!

Although Contributions received **in good order** are normally processed on the day they are received at CFI, if there are questions on your Contribution or enrollment form, mail delays, or an extremely high demand for processing, waiting until the last minute may be a problem.

Please review the deadlines below. While we expect to honor these deadlines, to be sure your Contribution will be credited for 2011, we **strongly** recommend you beat the rush and **not wait** until the last minute.

IMPORTANT NOTICE: A “Business Day” for processing Contributions is defined as any and each day that the New York Stock Exchange, the Program Administrator, the Program Administrator’s financial institution, State Street and Vanguard are open for business.

Since one or more of these groups will be closed Friday, December 23 and/or Monday, December 26 to observe the seasonal holiday; **no Contributions will be processed on those dates.**

New Accounts Forms and Contributions	Deadline
ONLINE New Enrollment and Participation Agreement with initial Contribution made by one-time electronic transfer (EFT) from your financial institution.	Must be submitted prior to 12 midnight ET on Tuesday, 12/27/11.
ONLINE New Enrollment and Participation Agreement with initial Contribution made by recurring draft (ACH) from your financial institution	Requests received in December cannot be guaranteed year-end processing due to time required for information exchange between the financial institution and CFI.
MAILED New Enrollment and Participant Agreement submitted with a Contribution check	Must be received prior to the 4:00 p.m. ET closing time of New York Stock Exchange on Friday, 12/30/11. Mail to P.O. Box 41930, Raleigh, NC 27629-1930

Existing Accounts Contributions	Deadline
By one-time electronic funds transfer (EFT)	Must be submitted prior to 12 midnight ET on Tuesday, 12/27/11.
A new request to set up a recurring automatic draft (ACH) or to change financial institution information on current ACH Contributions	Requests received in December cannot be guaranteed year-end processing due to time required for information exchange between the financial institution and CFI
Contribution by overnight delivery or registered mail	Must be received prior to 12 noon ET on Friday, 12/30/11. Deliver to 2917 Highwoods Blvd., Raleigh, NC 27604
Hand-delivered check Contribution	Must be received prior to 12 noon ET on Friday, 12/30/11. Deliver to 2917 Highwoods Blvd., Raleigh, NC
Wire transfer Contribution	Must be received by CFI's financial institution prior to 12 noon ET on Friday, 12/30/11 Call 800.600.3453 for instructions no later than 11:45 a.m. 12/30/11. NOTE: Past instructions you may have on file are no longer valid due to a change in CFI's financial institution.
Contributions by regular mail	Must be received prior to the 4:00 p.m. ET closing time of New York Stock Exchange on Friday, 12/30/11. Mail to P.O. Box 40877, Raleigh, NC 27629-0877
Rollover from Another 529 Program	Rollover requests received in December cannot be guaranteed year-end processing since the other 529 Program's administrator, not CFI, controls the delivery of funds.