

# NC 529 Plan

North Carolina's National College Savings Program



## Gift Form

Participant's Name: \_\_\_\_\_

Beneficiary's Name: \_\_\_\_\_

Account Number (if known): \_\_\_\_\_

- The minimum Contribution per Account is \$25.
- If you have questions about gift limits and tax considerations, please consult your financial or tax advisor.
- Contributions from anyone other than the Participant (owner of the Account) become the property of the Participant, regardless of the relationship or the identity of the contributor. Your gift will be invested as directed in the investment instructions on file for the Participant.
- All Contributions are subject to the prohibition under federal law and the Program Rules against Contributions in excess of those necessary to provide for the Qualified Higher Education Expenses of the Beneficiary.
- Make checks payable to "NC 529 Plan" and mail to: NC 529 Plan, PO Box 40877, Raleigh, NC 27629-0877. For overnight or registered mail, send to: NC 529 Plan, 2917 Highwoods Blvd., Raleigh, NC 27604.
- After cutting on the dotted line below, please attach the top portion of this form to your contribution check and send the lower portion to the recipient of your gift.

This form contains general information about the Program and shall not constitute an offer to sell any interests in the Program. An offer of interest in North Carolina's National College Savings Program may only be made by the official *Program Description for North Carolina's National College Savings Program* and an official Enrollment Agreement. You should carefully read the Program Description, which has complete information on options, fees, expenses, risks and restrictions, before making a decision to invest. The features of the 529 Qualified Tuition Programs are complex and involve significant tax issues.

CFNC.org/NC529 800-600-3453

CFI Form C428 (05/09)



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## Gift Notice

\_\_\_\_\_  
*Contributor's Name*

has given a gift of

\$ \_\_\_\_\_  
*Contribution Amount*

to the NC 529 Plan Account of

\_\_\_\_\_  
*Beneficiary's Name*