

Recontribution Request—529 College Savings Plan

Use this form to recontribute a refunded distribution amount to your 529 College Savings Plan account, or to update the reporting on a previous recontribution. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information, make a copy of the relevant page.

Helpful to Know

- Recontributions of distributions that were used to pay qualified higher education expenses that were later refunded by an eligible educational institution are permissible when made within 60 days of receiving the refund.
- Recontributed amounts cannot exceed the amount of the refund.
- The amount of the refunded distribution that is properly recontributed to your 529 College Savings Plan account *will not* be included in gross income for federal tax purposes; however, the original distribution will still be reported on your 1099-Q tax form. Please consult a tax advisor to ensure the recontribution is reported correctly on your tax return.

1. Account Information

This phone number may be used if we have questions, but will not be used to update your account information.

Participant (Owner)/Authorized Individual Name		Fidelity Account Number
Daytime Phone	Extension	
Beneficiary Name		

2. Recontribution Details

Provide the details of the original distribution and the refunded amount that was either previously recontributed under a separate deposit, or is being deposited along with this form.

Recontributions will be applied according to your current model portfolio or your most recent investment allocation information on file.

Date of Original Distribution MM/DD/YYYY	Amount of Original Distribution
	\$
Date of Recontribution <i>If already deposited</i>	Amount of Refunded Distribution You Are Recontributing
	\$

3. Signature and Date *Form cannot be processed without signature and date.*

By signing below, you:

- Represent that this is a recontribution of a refunded distribution from your 529 College Savings Plan account that was used to pay qualified higher education expenses.
- Represent that the money that is being recontributed into the 529 College Savings Plan account was refunded no more than 60 days ago by an eligible educational institution.
- Certify that all information you provided is true and correct to the best of your knowledge.
- Indemnify the 529 College Savings Plan in which you hold your account and Fidelity, its agents, successors, affiliates, and employees, from any liability in the event that you fail to meet IRS requirements for recontributions.

PRINT PARTICIPANT/AUTHORIZED INDIVIDUAL NAME	
PARTICIPANT/AUTHORIZED INDIVIDUAL SIGNATURE	DATE MM/DD/YYYY
SIGN X	X

Form continues on next page. ►►



Did you sign the form?

Send the form to Fidelity Investments.

Questions?

Go to [Fidelity.com/college](https://www.fidelity.com/college) or call 800-544-1914.

Use the postage-paid envelope, drop off at a Fidelity Investor Center, OR deliver to:

Regular mail

Fidelity Investments
Attn: Core/HNW Operations
P.O. Box 770001
Cincinnati, OH 45277-0045

Overnight mail

Fidelity Investments
Attn: Core/HNW Operations
100 Crosby Parkway KC1K
Covington, KY 41015

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