

Employee Payroll Deduction Form



Instructions

Please complete this form to establish, change or delete payroll deduction instructions on your existing The Education Plan® account(s). If you are setting up payroll deduction for a new account, complete and attach a separate application for each beneficiary. Before completing this form, check with your payroll department regarding the availability of this service. Your payroll department must complete an Employer Authorization Payroll Deduction Form before you can begin payroll deduction.

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ● not ⊗ not ⊙

If you have any questions about this form, please call **1.877.EdPlan8 (1.877.337.5268)**.

1 | Employee/Company Information

Employee's first name _____ Middle initial _____ Last name _____ Social Security number _____
 () _____
 Employee's phone number _____ Employee's email address _____
 _____ () _____
 Company name _____ Company phone number _____

 Company contact _____

2 | Payroll Deduction Information

- A. Establish a new payroll deduction Cancel existing deduction
 Change allocation percentage

B. Payroll Deduction Amount

Indicate the amount to be deducted from your paycheck each pay period. The minimum investment is \$25 per month per portfolio.

Total Deduction Amount \$ _____

This dollar amount will be invested according to your Elected Investment Allocation on file at the time the assets are received. If you are establishing a new account, the assets will be invested according to your instructions on the Account Application.

All dollar allocations will be stored as percentages. Payroll dollars will be invested based on the stored percentages until the account owner submits a new form.

Account number	Beneficiary's name	Percentage of deduction to be allocated to each account (full % only)
		.00%
		.00%
		.00%
		.00%
Total		100.00%

3 | Authorized Signature

Employee's Signature _____

Date _____

All Employees

Make two copies of this Employee Payroll Deduction Form and:

1. Retain a copy for your records.
2. Provide a copy of this form to your Human Resources Department once you obtain your Education Plan account number so they can initiate the payroll deduction.
3. Your Human Resources Department will send a copy of the Form to the Education Plan at:

The Education Plan
P.O. Box 173691
Denver, CO 80217



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