

Employer Authorization Form – Payroll Deduction



®

== 529 ==

Save today for your child's tomorrow

Instructions

Please complete this form to establish an employer-sponsored 529 plan for your employees through payroll deduction. This form must be completed prior to accepting contributions from any of your employees.

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

Once completed, please send or fax this form to Scholar's Edge® at the following address:

Regular Mail:
Scholar's Edge®
P.O. Box 173691
Denver, CO 80217

Fax: 1.303.768.6529

_____ Company name		_____ Federal Tax ID number	
_____ Company address	_____ City	_____ State	_____ Zip
_____ Contact person		_____ Telephone number	
_____ Title		_____ Fax number	
_____ Email address		_____ Number of employees in company	

- A. Approximate date company plans to begin payroll deduction (mm/yyyy): _____
- B. Frequency of deposits: Weekly Biweekly Monthly Quarterly Other
- C. Do you use a third-party vendor? No Yes, name of vendor: _____
- D. How do you intend to send in contributions?

Via check—You must send a spreadsheet of employee names, account numbers and dollar amounts.
 You can either fax the spreadsheet to **1.303.768.6529, ATTN: Wire Desk**, or mail the spreadsheet with the check to the address below.
 Make check payable and mail to:
 Scholar's Edge®
 P.O. Box 173691
 Denver, CO 80217

Via wire for ALL employees—Please send one consolidated contribution amount for ALL employees using the instructions below. You must send a spreadsheet of employee names, account numbers and dollar amounts.
 Please fax the spreadsheet to 1.303.768.6529, ATTN: Wire Desk
 UMB Bank
 ABA # 101000695
 Account # 9871691691
 FFC to (Insert Company Name)

Via ACH for EACH employee by account number—Send an individual ACH for EACH employee using these instructions:
 UMB Bank
 ABA # 101000695
 Account # 1111532 _____
 (Your employee's 10-digit account number)





OppenheimerFunds®

Distributor, Inc.

Scholar's Edge® is operated as a qualified tuition program offered by The Education Trust Board of New Mexico and is available to all U.S. residents. OFI Private Investments Inc., a subsidiary of OppenheimerFunds, Inc., is the program manager for Scholar's Edge® and OppenheimerFunds Distributor, Inc. is the distributor of Scholar's Edge®.

Scholar's Edge® is distributed by OppenheimerFunds Distributor, Inc. Member FINRA, SIPC
225 Liberty Street, New York, NY 10281-1008

Scholar's Edge® and the Scholar's Edge® logo are registered trademarks of The Education Trust Board of New Mexico used under license.

SE0000.127.1115 November 3, 2015