

- Log in to your Interested Party account at: <https://login.my529.org/login>
- Click on the *Accounts* button on the left side of the screen

The screenshot displays the my529.org user interface. At the top left, there is a navigation menu with icons for home, user profile, and documents. The user profile icon is highlighted with an orange box and an arrow. The main header includes the my529 logo, the word "Home", and the user's email address: uesptest+InterestedParty-31877@gmail.com. Below the header, the page is titled "Good Afternoon, Interested Party Name" and "Overview". A "Beneficiary Account" section shows the beneficiary name and account number ****1234. A "SAVINGS CALCULATOR" button is visible. A step chart shows the account balance over time, with the y-axis ranging from \$0k to \$11k and the x-axis showing months from August to July. The balance starts at \$10k in August, drops to \$6k in September, then to \$2k in December, and fluctuates between \$2k and \$6k through July. A "Date" selector is set to 07/10/2023. At the bottom, there is an "Accounts" section and a "GRAND TOTAL AS OF 7/30/2023" label.

my529[®] Home

Good Afternoon, Interested Party Name Overview uesptest+InterestedParty-31877@gmail.com

Beneficiary Account
Beneficiary Name
FDIC-Insured - Interested Party
****1234

SAVINGS CALCULATOR

\$11k
\$10k
\$9k
\$8k
\$7k
\$6k
\$5k
\$4k
\$3k
\$2k
\$1k
\$0k

Aug Sep Oct Nov Dec Jan 2023 Feb Mar Apr May Jun Jul

1 Month 3 Month 6 Month YTD 1 Year All Custom

Beneficiary Name \$4,288.28
FDIC-Insured - Interested Party
****1234

Date 07/10/2023

Accounts

GRAND TOTAL AS OF 7/30/2023

- On the next screen, click on the *REQUEST WITHDRAWAL* button

The screenshot displays the my529 Accounts interface. At the top left, the my529 logo and 'Accounts' title are visible. A navigation sidebar on the left contains icons for home, user profile, and documents. The main content area features a 'SUMMARY' tab with a dropdown arrow and a search icon. Below this, the account balance is shown as '\$4,288.28' with the date 'GRAND TOTAL AS OF 7/30/2023'. An 'ADD ACCOUNT' button is located to the right. The account is identified as 'Scholarship - Interested Party'. The beneficiary information includes 'Beneficiary Name', 'CSA Program Name', and 'FDIC-Insured *****1234'. The total value is '\$4,288.28' with a 'MARKET DATE 7/30/2023' and a 'YTD RETURN 2.70%'. A 'REQUEST WITHDRAWAL' button is highlighted with an orange box and an arrow. A vertical 'Feedback' button is on the right edge. At the bottom, there is an 'Important Legal Notice' link.

my529[®] Accounts

SUMMARY (...17268)

GRAND TOTAL AS OF 7/30/2023
\$4,288.28

ADD ACCOUNT

Scholarship - Interested Party

BENEFICIARY	TOTAL VALUE
Beneficiary Name	\$4,288.28
CSA Program Name	MARKET DATE 7/30/2023
FDIC-Insured *****1234	\$4,288.28 YTD RETURN 2.70%

REQUEST WITHDRAWAL

Feedback

Important Legal Notice ^

- Select either a *Full Balance* or *Partial Balance* withdrawal
 - If you select *Partial Balance*, you will need to input an amount
- For security purposes, you will need to validate your *Birth Date*

my529 Account Details

Accounts > Account Details > Withdrawal Requests

ACCOUNT DETAILS

Beneficiary
Beneficiary Name

Account Number
*****1234

Current Option
FDIC-Insured

Available For Withdrawal ⓘ
\$4,288.28

1 Amount 2 Recipient 3 Terms and Conditions 4 Confirmation

Full Balance
 Partial Balance

Amount
\$ 1,000.00

Beneficiary Birth Date
01/01/2005

CANCEL NEXT

Feedback

- Click on the *SEARCH ELIGIBLE SCHOOLS* button

The screenshot displays the my529 Account Details page. At the top left, there is a navigation menu with icons for home, user profile, and documents. The page title is "my529 Account Details". Below the title, a breadcrumb trail reads "Accounts > Account Details > Withdrawal Requests".

The main content area is titled "ACCOUNT DETAILS" and lists the following information:

- Beneficiary**
- Beneficiary Name**
- Account Number**: *****1234
- Current Option**: FDIC-Insured
- Available For Withdrawal** ⓘ: \$4,288.28

Below the account details is a progress bar with four steps: 1. Amount (marked with a green checkmark), 2. Recipient, 3. Terms and Conditions, and 4. Confirmation. The "SEARCH ELIGIBLE SCHOOLS" button is located between the "Recipient" and "Terms and Conditions" steps, highlighted with an orange border and an orange arrow pointing to it.

At the bottom of the progress bar, there are three buttons: "CANCEL", "BACK", and "NEXT".

On the right side of the page, there is a vertical "Feedback" button. At the bottom of the page, there is a link for "Important Legal Notice" with an upward-pointing arrow.

- Fill out the address of the school where they accept physical checks
- Your student ID number is also required and will be included on the check

\$4,288.28

1 Amount2 Recipient3 Terms and Conditions4 Confirmation

[SEARCH ELIGIBLE SCHOOLS](#)

A check will be mailed in 3-5 business days to:

Name of School
University Of Colorado-Boulder

Attention/Department
→ Bursar's Office

Street Address
→ 2055 Regent Dr. 43 UCB

City
→ Boulder

State
→ Colorado

Postal Code
→ 80309

For the benefit of (FBO)
Beneficiary Name

Student ID Number
→ 123456

[CANCEL](#) [BACK](#) [NEXT](#)

[Important Legal Notice](#) ^

- Review the details and the Terms & Conditions on the next page
- Check the box to agree to the Terms & Conditions and then press Next

my529 Account Details

Accounts > Account Details > Withdrawal Requests

ACCOUNT DETAILS

Beneficiary
Beneficiary Name
Account Number
 *****1234
Current Option
 FDIC-Insured
Available For Withdrawal ⓘ
 \$4,288.28

Amount Recipient Terms and Conditions Confirmation

Amount	Recipient
\$1,000.00	University Of Colorado-Boulder Bursars Office 2055 Regent Dr. 43 UCB Boulder, CO 80309 FBO Beneficiary Name Student ID: 123456

Terms and Conditions

Use of Funds

I understand my529 is not responsible for tracking the use of funds withdrawn from my529 accounts or determining their eligibility as qualified higher education expenses (including K-12 tuition expenses). I understand that I am responsible for maintaining adequate records, such as receipts and other documentation, for qualified higher education expenses (including K-12 tuition expenses).

Use of Funds

I understand my529 is not responsible for tracking the use of funds withdrawn from my529 accounts or determining their eligibility as qualified higher education expenses (including K-12 tuition expenses). I understand that I am responsible for maintaining adequate records, such as receipts and other documentation, for qualified higher education expenses (including K-12 tuition expenses).

Nonqualified Withdrawals

I understand that any amount of this withdrawal used for nonqualified higher education expenses will make that amount a nonqualified withdrawal. I understand that the earnings portion of nonqualified withdrawals will be subject to federal and applicable state income taxes (including any recapture of Utah state income tax credit or deduction previously claimed), as well as an additional 10 percent federal penalty tax. Withdrawals due to the beneficiary's death, disability, scholarship (up to the amount of the scholarship), or U.S. Service academy attendance are exempt from the penalty tax (but are still subject to income tax on the earnings portion of that withdrawal).

If any part or all of this withdrawal becomes nonqualified, I understand that either I or the beneficiary, as applicable, will be responsible for reporting the withdrawal on an income tax return for the tax year of the withdrawal and for paying any related taxes or penalties.

Tax Forms

I understand that my529 will send IRS Form 1099-Q in January each year after a withdrawal is issued from an account. This form states the total amount, principal, and earnings portion of all withdrawals in a calendar year, for each payee, as applicable.

In addition, I understand that Utah taxpayer/resident account owners will receive a TC-675H tax form each year. This form states the following information for an account owner: total qualifying contributions to count toward a Utah state income tax credit, or deduction, total withdrawals made, and total amount transferred to a nonqualified beneficiary.

Request Submission

I certify that the information entered for this withdrawal request is true and accurate.

I authorize my529 to make my requested withdrawal.

If the account is an UGMA/UTMA account, I certify that I am the custodian of the account and the withdrawal request is necessary for the welfare and benefit of the beneficiary. If the account is owned by a trust, corporation, or other entity, I certify that I am authorized to act on its behalf.

I agree to the terms and conditions

CANCEL BACK NEXT

Use of Funds

I understand my529 is not responsible for tracking the use of funds withdrawn from my529 accounts or determining their eligibility as qualified higher education expenses (including K-12 tuition expenses). I understand that I am responsible for maintaining adequate records, such as receipts and other documentation, for qualified higher education expenses (including K-12 tuition expenses).

Federal law mandates that total withdrawals from all qualified tuition plans, such as my529, to pay for K-12 tuition expenses cannot exceed \$10,000 annually per beneficiary from all 529 accounts. I understand that I am responsible for adhering to the federal limit.

Nonqualified Withdrawals

I understand that any amount of this withdrawal used for nonqualified higher education expenses will make that amount a nonqualified withdrawal. I understand that the earnings portion of nonqualified withdrawals will be subject to federal and applicable state income taxes (including any recapture of Utah state income tax credit or deduction previously claimed), as well as an additional 10 percent federal penalty tax. Withdrawals due to the beneficiary's death, disability, scholarship (up to the amount of the scholarship), or U.S. Service academy attendance are exempt from the penalty tax (but are still subject to income tax on the earnings portion of that withdrawal).

If any part or all of this withdrawal becomes nonqualified, I understand that either I or the beneficiary, as applicable, will be responsible for reporting the withdrawal on an income tax return for the tax year of the withdrawal and for paying any related taxes or penalties.

Tax Forms

I understand that my529 will send IRS Form 1099-Q in January each year after a withdrawal is issued from an account. This form states the total amount, principal, and earnings portion of all withdrawals in a calendar year, for each payee, as applicable.

In addition, I understand that Utah taxpayer/resident account owners will receive a TC-675H tax form each year. This form states the following information for an account owner: total qualifying contributions to count toward a Utah state income tax credit, or deduction, total withdrawals made, and total amount transferred to a nonqualified beneficiary.

Request Submission

I certify that the information entered for this withdrawal request is true and accurate.

I authorize my529 to make my requested withdrawal.

If the account is an UGMA/UTMA account, I certify that I am the custodian of the account and the withdrawal request is necessary for the welfare and benefit of the beneficiary. If the account is owned by a trust, corporation, or other entity, I certify that I am authorized to act on its behalf.

I agree to the terms and conditions

CANCEL BACK NEXT

- The final page is a printable confirmation
- The withdrawal request will be sent to your CSA program administrator to review

Accounts > Account Details > Withdrawal Requests

ACCOUNT DETAILS

Beneficiary
Beneficiary Name

Account Number
*****1234

Current Option
FDIC-Insured

Available For Withdrawal ⓘ
\$4,288.28

Amount ✓ Recipient ✓ Terms and Conditions ✓ Confirmation 4

Withdrawal Confirmation and Summary

Congratulations! Your online withdrawal request has been submitted. my529 will send you an email confirmation shortly.

Amount	Recipient
\$1,000.00	University Of Colorado-Boulder Bursars Office 2055 Regent Dr. 43 UCB Boulder, CO 80309 FBO Beneficiary Name Student ID: 123456

08/03/2023 4:46 PM MT

Please print a copy of this page for your records.

→ PRINT FINISH ←

Feedback