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### FAMILY & FRIENDS CAN CONTRIBUTE

One of our most frequently asked questions is, “How can my family members or friends make contributions to my account?”. It’s easy for others to contribute to your account at any time. The easiest way for others to make contributions is to have them complete a deposit coupon and mail it to us along with a check. Blank deposit coupons can be downloaded from the “Forms” link of our website. Checks should be made payable to CollegeCounts 529 Fund and can be mailed to us at PO Box 85290, Lincoln, NE 68501.

We also have gift cards available that your family/friends could request that they could then place in a Birthday card or provide to you to notify you that a contribution was made to your account. If you or any of your family/friends would like a supply of the gift cards, simply contact us at 866.529.2228 and we would be happy to mail some.

Keep in mind that any contributor who files an Alabama State Income Tax Return may be eligible to take advantage of the state income tax deduction for the contributions they make to an account. The limit for the Alabama State Income Tax Deduction is up to \$5,000 for single filers and goes up to \$10,000 for joint filers. All contributors should keep accurate records of the contributions they make in order to claim the deduction when they file their taxes.

### SERVICE GROUPS & PARENT ORGANIZATIONS

Are you a member of a Service Group, or a Community or Parent Organization? Could the members of your organization benefit from learning more about the CollegeCounts 529 Fund? If so, we would be happy to provide more information about the program to your group. We are available to do presentations at meetings and can tailor the length and information provided to meet your needs – from twenty minutes to one hour. We also have informational brochures, flyers, and bookmarks available for those would like some basic information about the program. If you have an interest in a presentation or materials to hand out, please feel free to contact us at 866.529.2228. Help us spread the word to your friends and neighbors about all the benefits the CollegeCounts 529 Fund can provide while saving for future college expenses.

### WITHDRAWALS FOR THE FALL SEMESTER

Whether your student is preparing for their first year of college or their last, the fall semester will be here in no time. As you prepare for the school year, keep in mind that funds can be withdrawn as qualified expenses from your CollegeCounts account for the following items: tuition, fees, books, supplies, and equipment. Room and Board expenses are qualified as long as the student is enrolled on at least a half-time basis. Remember to keep all of your receipts and invoices in the event the IRS would ever have questions about your expenses or withdrawals. Be sure to match your expenses and withdrawals in the same calendar year for tax purposes.

The Account Owner has several options for requesting a withdrawal from an account:

1. **Quickest & Easiest** → Log into your account online and go through the simple steps
2. Complete the Withdrawal Request Form
3. Contact us at 866.529.2228 to request the withdrawal over the phone

### PREPARE FOR COLLEGE – PETERSONS.COM

If you currently have a high school or college student and are looking for a helpful resource to prepare for college, [www.petersons.com](http://www.petersons.com) is a great website to visit. This comprehensive site provides information about finding the right college/program for your student, assistance with test preparation, and financial aid information. The site also offers a free scholarship search to help you find additional funds to pay for college expenses. The site is a great place to obtain valuable information that can make planning for college a little easier for you and your student.

### OUR THOUGHTS ARE WITH YOU

The thoughts and prayers of all staff members of the CollegeCounts 529 Fund have been with Alabama residents affected by the recent violent weather. We were proud to support clean-up efforts with monetary donations as well as volunteer work. We will continue to support you as you rebuild your communities. Best wishes!

Thank you for investing  
with CollegeCounts.

**CollegeCounts™**  
Alabama's 529 Fund



Offered by the State of Alabama

**UNION BANK**  
& TRUST COMPANY.

Program Manager

Investment Products:  
· Not FDIC Insured  
· No Bank Guarantee  
· May Lose Value