



Payroll Deduction Authorization Form

Complete this form and return to:

CollegeAdvantage 529 Savings Plan
P.O. Box 932355
Cleveland, OH 44193

Instructions:

- Use this form to make payroll deduction contributions to a CollegeAdvantage account. You can start, stop or change payroll deduction instructions using this form.
- Please print clearly in blue or black ink.
- Anyone can set up payroll deduction contributions to a CollegeAdvantage account, not just the Account Owner.
- If you are the Account Owner, you can add new investment options to your account using this form.
- Please allow at least four weeks after receipt of this form for any change or initial deduction to occur.
- To complete this form, you will need:
 - your CollegeAdvantage Company Identification number.
 - the CollegeAdvantage account numbers for the accounts you wish to contribute to through payroll deduction.
 - investment options selected for your payroll deduction contributions.
- **SIGNATURE REQUIRED** on last page.

1

Contributor information (does not have to be Account Owner)

Contributor's first name _____ M.I. _____ Last name _____

Contributor's mailing address (including apartment or box number) _____

City _____ State _____ ZIP code _____ - _____

(_____) _____ - _____ Home phone/Cell phone (_____) _____ - _____ Work phone

Contributor's Social Security number _____ Contributor's date of birth (mm/dd/yyyy) _____

2

Employer information

Company name _____

CollegeAdvantage Company Identification number*

CO - _____

*Required—Payroll deductions cannot be processed without this number. Please contact your Benefits office if you do not know your company's identification number.

3 Payroll deduction instructions

You must have an existing CollegeAdvantage account to establish payroll deduction using this form.

The information provided on this form will change the information on file (if any) for all CollegeAdvantage accounts for which payroll deduction is currently being processed. Please provide information for all Beneficiary accounts below, even if you are only changing information for one Beneficiary account.

Within each Beneficiary account entry block:

To ensure your payroll deduction is invested correctly, provide the investment option code(s) for each investment option to which you wish to contribute, and the corresponding dollar amount. If you wish to change your payroll deduction amount, add payroll deduction, or add a new investment option, please provide the investment option codes below and check the appropriate box. Also include any investment option(s) that are not changing at this time, so your total deduction amount will be correct. If you wish to stop an existing payroll deduction, enter the investment option codes below, enter "0" in the contribution area, and check the "Stop" box.

These instructions replace all previous payroll deduction instructions on file.

Payroll deduction is not available for Fifth Third 529 Certificates of Deposit, so that option is not listed below.

Beneficiary #1

Beneficiary #1's name

Beneficiary #1's CollegeAdvantage account number

Investment Option code	Contribution per paycheck (minimum \$25)	Add	Change	Continue	Stop
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL	\$ _____,_____._____	Include total in Section 4			

CollegeAdvantage Investment Options

Code

CollegeAdvantage Investment Options		Code
AGE-BASED OPTIONS		
The Advantage Age-Based Option		AABO
Vanguard Conservative Age-Based Option		VCAB
Vanguard Moderate Age-Based Option		VMAB
Vanguard Aggressive Age-Based Option		VAAB
BALANCED OPTIONS (MIX OF STOCKS AND BONDS)		
Vanguard Conservative Growth Index Portfolio		VCGP
Vanguard Moderate Growth Index Portfolio		VMGP
Vanguard Wellington Option		VWLO
Vanguard Growth Index Portfolio		VGIP
BANK OPTIONS (100% CASH)		
Fifth Third 529 Savings Account		FTSAV
CAPITAL PRESERVATION (CASH) AND FIXED-INCOME (BOND) OPTIONS		
Vanguard Prime Money Market Option		VPMM
Vanguard Inflation-Protected Bond Option		VIPB
Vanguard Income Portfolio		VINC
PIMCO Total Return Option		PTRO
PIMCO High Yield Option		PHYO
EQUITY OPTIONS (100% STOCKS)		
Vanguard Aggressive Growth Index Portfolio		VAGP
Vanguard 500 Index Option		V500
Vanguard Windsor II Option		VWII
Vanguard Morgan Growth Option		VMNG
Vanguard Extended Market Index Option		VEMI
Oppenheimer Main Street Small- & Mid-Cap Option		OMSS
Vanguard Developed Markets International Stock Index Option		VDIM
GE Institutional International Equity Option		GEIO

Beneficiary #2

Beneficiary #2's name

Beneficiary #2's CollegeAdvantage account number

Investment Option code	Contribution per paycheck (minimum \$25)	Add	Change	Continue	Stop
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____	\$ _____,_____._____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL	\$ _____,_____._____	Include total in Section 4			

Signature required

3 Payroll deduction instructions (continued)

Beneficiary #3

Beneficiary #3's name

Beneficiary #3's CollegeAdvantage account number

Investment Option code	Contribution per paycheck (minimum \$25)	Add	Change	Continue	Stop
	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL	\$	<input type="button" value="← Include total in Section 4"/>			

4 Total payroll deduction per paycheck

Write in the total amount of your payroll deduction below after completing Section 3.

Beneficiary #1 total: \$

Beneficiary #2 total: \$

Beneficiary #3 total: \$

Deduction per paycheck \$

5 Signature

I hereby authorize payroll deduction. I also reserve the right to revoke this authorization by written notice to the Ohio Tuition Trust Authority. I acknowledge that these instructions replace all previous payroll deduction instructions on file for my CollegeAdvantage account(s).

Note: If you select any of the Fifth Third Bank investment options, then your signature below, together with this form and *Offering Statement and Participation Agreement*, which includes Fifth Third Bank's Rules, Regulations, Agreements and Disclosures, constitutes the Deposit Agreement between you and Fifth Third Bank.

Signature of employee

Signature date (mm, dd, yyyy)

Any investment in a CollegeAdvantage mutual fund-based investment option is not insured or guaranteed by the FDIC or any other governmental agency or other party, including the state of Ohio, the Tuition Trust or any of the mutual fund firms under contract with OTTA. Any investment in a Fifth Third investment option, however, is insured by the Federal Deposit Insurance Corporation (FDIC), up to the limits set by the FDIC. An investment in a CollegeAdvantage mutual fund-based investment option is not a direct investment in a mutual fund itself. Except for the Fifth Third investment options, participants assume all investment risk of an investment in CollegeAdvantage, including the potential loss of principal. Regular investing does not ensure a profit or protect against a loss. The amount actually available for withdrawal will depend on the investment performance of the options chosen during the period funds were invested.