

Schwab 529 Plan

Uqift® – Give College Savings

Josee Memorial Sep 20, 2014

We'd like to let you know about Sophie's upcoming celebration.

If you are thinking about giving a gift for the occasion, please consider making a gift contribution to Sophie's Schwab 529 Plan account instead. This is a special account we opened to help save for Sophie's college expenses. We can't think of a more meaningful gift than helping Sophie make the dream of college possible.

Thank you, Sandeep Sahai

How is my gift processed?

- If you choose to give a gift to the beneficiary's Schwab 529 account, you must mail the gift coupon along with a check made out to "Ugift: Schwab 529", to the address indicated on this form.
- The check will be held in a non-interest bearing account until approximately two business days after the celebration date and then transferred into the beneficiary's Schwab 529 account. For instance, if the celebration date is the beneficiary's June 15th birthday, and your check is received on May 15, your check will be deposited into the non-interest bearing account and transferred to the beneficiary's Schwab 529 Plan account two business days after June 15.
- The account owner will be notified of your gift if you include your full name in the boxes provided below. This invitation also includes an optional gift certificate, which you can fill out and present to the beneficiary, informing this person of your gift to the Schwab 529 account.

To make a gift, please **print this page** and follow these steps:



Write

in the amount you wish to give on the slip shown below.



your personal check payable to **Ugift:** Schwab 529 Plan and include Sandeep Sahai's name in your personal check's memo field.



Mail

the check and this page to: Ugift: Schwab 529 Plan P.O. Box 2906 Shawnee Mission, KS 66201-2906



out a gift certificate that you can hand to the recipient or enclose in a card (optional). click here.

Please write your full name in the boxes below so this special gift is attributed to you.

First Name					Last	n Nar	n e					

Schwab 529 Plan will send a confirmation of your gift to Sandeep Sahai.

T gift [®]	<i>charles</i> SCHWAB
Make checks nava	hle to:

Account Owner Beneficiary Gift Minimum

Sandeep Sahai Sophie Sahai \$25.00

Ugift: Schwab 529 Plan

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Amount Enclosed:

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100026232195

lgift: Schwab 529 Plan

P.O. Box 2906

Shawnee Mission, KS 66201-2906

Questions? Call Schwab 529 Plan at 1-888-903-3863. A client service representative will be available to assist you Monday through Friday, from 9:30 a.m. to 6:30 p.m. Eastern Time.

The $Ugift^{\otimes}$ program is an optional service offered by Upromise Investment Advisors, LLC. For more information, visit schwab.com or call the Schwab 529 Plan team at 1-888-903-3863.

The Schwab 529 Plan is serviced through Charles Schwab & Co., Inc. and is managed by American Century Investment Services, Inc. The plan was created by the Kansas State Legislature under the provisions of Section 529 of the Internal Revenue Code and is administered by Kansas State Treasurer Ron Estes.

Notice: Accounts established under Schwab 529 Plan and their earnings are neither insured nor guaranteed by the state of Kansas, the Kansas State Treasurer, American Century Investments, or Charles Schwab & Co., Inc. Accounts established under Schwab 529 Plan are domiciled at American Century Investments and not Schwab. American Century Investment Services, Inc., distributor and underwriter.

Charles Schwab & Co., Inc., American Century Investments, and Upromise Investment Advisors, LLC are separate and unaffiliated companies.

Schwab Advisor ServicesTM serves independent investment advisors and includes the custody, trading, and support services of Charles Schwab & Co., Inc.

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