

# Iowa Advisor 529 Plan Payroll Direct Deposit - Contributor

Complete this form and forward it to your payroll department to establish Payroll Direct Deposit for all or part of your paycheck to your Iowa Advisor 529 Plan account. Before completing this form, confirm with your payroll department that they offer this service through the Automated Clearing House (ACH) and if they require their own form to establish Payroll Direct Deposit. If you have questions about this form or if you receive your checks from the federal government (or an agency of the federal government), contact your financial advisor or call **1-800-774-5127**. Information is also available online at [www.iowaadvisor529.com](http://www.iowaadvisor529.com).



## 1 CONTRIBUTOR INFORMATION

To help ensure timely and accurate processing of this form, please print clearly.

Name of contributor (first, middle initial, last) \_\_\_\_\_ Social Security/taxpayer ID number \_\_\_\_\_

U.S. residential street address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

Work phone \_\_\_\_\_ Home phone \_\_\_\_\_

Birth Date (month/day/year) \_\_\_\_\_

## 2 EMPLOYER INFORMATION

Company Name \_\_\_\_\_ Company Code \_\_\_\_\_

Company address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP code \_\_\_\_\_

## 3 PAYROLL DEDUCTION INSTRUCTIONS

You must have an existing Iowa Advisor 529 Plan Account to establish payroll deduction using this form. Or, you may send this form along with your account application. If you wish to change your payroll deduction amount or add payroll deduction, please complete the Investment Option boxes below. If you wish to stop an existing payroll deduction, enter the Investment Option codes, enter "0" in the contribution boxes, and check the "Stop" box.

Any current payroll deductions on file for an existing Investment Option will not be updated if the option is not listed below.

Instructions on Completing This Form

### Step 1

Tell us the total amount you will have deducted per paycheck, and how you would like that amount allocated amongst your beneficiaries. For example, to allocate \$100 each to three beneficiaries per pay check, indicate "\$100" in the field next to each named beneficiary and "\$300" in the "Total" line at the bottom.

Beneficiary #1 \_\_\_\_\_ \$ \_\_\_\_\_  
Full Name

Beneficiary #2 \_\_\_\_\_ \$ \_\_\_\_\_  
Full Name

Beneficiary #3 \_\_\_\_\_ \$ \_\_\_\_\_  
Full Name

TOTAL payroll deduction per paycheck \_\_\_\_\_ Total: \$ \_\_\_\_\_  
(This must equal the sum of all contributions)

Once this section is completed, move on to the next section to indicate your investments selections for each beneficiary.

**Step 2**

Now tell us how you want each 529 Plan beneficiary's payroll deduction allocated among their Investment Options. Please keep in mind, the minimum payroll deduction amount per pay period per Option is \$25.00.

If you have more than 3 beneficiaries, make a copy of this page and include it with your submission.

**Beneficiary #1**

\_\_\_\_\_  
Full Name of the Contributor

\_\_\_\_\_  
Iowa Advisor 529 Plan Account Number

\_\_\_\_\_  
Social Security Number on Account

<b>Investment Option</b>	<b>Amount to Invest</b>	<b>Add</b>	<b>Change</b>	<b>Stop</b>
_____	_____ %			
_____	_____ %			
_____	_____ %			
_____	_____ %			
_____	_____ %			

**Beneficiary #2**

\_\_\_\_\_  
Full Name of the Contributor

\_\_\_\_\_  
Iowa Advisor 529 Plan Account Number

\_\_\_\_\_  
Social Security Number on Account

<b>Investment Option</b>	<b>Amount to Invest</b>	<b>Add</b>	<b>Change</b>	<b>Stop</b>
_____	_____ %			
_____	_____ %			
_____	_____ %			
_____	_____ %			
_____	_____ %			

**Beneficiary #3**

\_\_\_\_\_  
Full Name of the Contributor

\_\_\_\_\_  
Iowa Advisor 529 Plan Account Number

\_\_\_\_\_  
Social Security Number on Account

<b>Investment Option</b>	<b>Amount to Invest</b>	<b>Add</b>	<b>Change</b>	<b>Stop</b>
_____	_____ %			
_____	_____ %			
_____	_____ %			
_____	_____ %			
_____	_____ %			

**4** INVESTMENT INSTRUCTIONS / EMPLOYER

- Code the Iowa Advisor 529 Plan account type as "Checking" and transmit the funds to BNY Mellon (ABA Number 011001234).
- Enter the Iowa Advisor 529 Plan account number as a 17-digit field without any dashes or spaces: 4-digit prefix "9050"; 9-digit social security number; and "9999".

**5** SIGNATURE OF CONTRIBUTOR / EMPLOYEE

Submit a copy of this completed form to your payroll department.

I hereby authorize my employer to automatically deduct from my paycheck the amount specified in section 2 of this form and transmit that amount to the account number indicated in section 3 of this form. Investments will be made at the then current Net Asset Value of the Option indicated herein, including any applicable sales charge. I understand that all instructions under the Payroll Direct Deposit Plan (the "Plan"), including changes in the amount of the investment or cancellation of the Plan, must be made in writing to my employer. It is the sole responsibility of my employer to arrange for all transactions. If monies to which I am not entitled are transmitted by my employer to my Iowa Advisor account, I authorize my employer to redeem on my behalf Option shares in the amount necessary to obtain the return of the entire amount of these monies. I authorize the applicable Option and its transfer agent to follow all instructions by my employer in connection with transactions made under the Plan, including the redemption of Option shares, and I agree not to make claims against Iowa Advisor 529 Plan, its Program Manager, transfer agent, distributor, or Board for following the instructions of my employer. The availability of funds in my account is subject to verification of the transfer. The terms of the Plan may be terminated or modified at any time and without notice. I understand and agree to the terms set forth herein.

✗ \_\_\_\_\_  
Signature of Contributor / Employee                              Print name                              Date

✗ \_\_\_\_\_  
Signature of Account Owner if different than Contributor                              Print name                              Date

**6** MAILING INSTRUCTIONS FOR COMPLETED FORMS**REGULAR MAIL**

Iowa Advisor 529 Plan  
c/o Voya Investment Management  
PO Box 9659  
Providence, RI 02940-9659

**OVERNIGHT/COURIER**

Iowa Advisor 529 Plan  
c/o Voya Investment Management  
4400 Computer Drive  
Westborough, MA 01581-1722

Iowa Advisor 529 Plan is a part of the Iowa Educational Savings Plan Trust, a state-sponsored 529 college savings plan administered by the State of Iowa, for which the Treasurer of the State of Iowa serves as the Trustee. Voya Investment Management Co. LLC provides investment management and administrative services for the Iowa Advisor 529 Plan. Shares in the Program are distributed by Voya Investments Distributor, LLC, Member FINRA/SIPC.



Option	Option Name	Cusip
6100	IADVISOR 529 AGE 0 - 5 OPTION CLASS A	462266537
6101	IADVISOR 529 AGE 0 - 5 OPTION CLASS C	462266529
6104	IADVISOR 529 AGE 11 - 15 OPTION CLASS A	462266487
6105	IADVISOR 529 AGE 11 - 15 OPTION CLASS C	462266479
6106	IADVISOR 529 AGE 16 - 17 OPTION CLASS A	462266461
6107	IADVISOR 529 AGE 16 - 17 OPTION CLASS C	462266453
6108	IADVISOR 529 AGE 18+ OPTION CLASS A	462266446
6109	IADVISOR 529 AGE 18+ OPTION CLASS C	462266438
6102	IADVISOR 529 AGE 6 - 10 OPTION CLASS A	462266511
6103	IADVISOR 529 AGE 6 - 10 OPTION CLASS C	462266495
6000	IADVISOR 529 AGGRESSIVE OPTION CLASS A	462266107
6001	IADVISOR 529 AGGRESSIVE OPTION CLASS C	462266206
6006	IADVISOR 529 CONSERVATIVE OPTION CLASS A	462266701
6007	IADVISOR 529 CONSERVATIVE OPTION CLASS C	462266800
6002	IADVISOR 529 GROWTH OPTION CLASS A	462266305
6003	IADVISOR 529 GROWTH OPTION CLASS C	462266404
6004	IADVISOR 529 MODERATE OPTION CLASS A	462266503
6005	IADVISOR 529 MODERATE OPTION CLASS C	462266602
6008	IADVISOR 529 ULTRA-CONSERVATIVE OPTION CLASS A	462266883
6009	IADVISOR 529 ULTRA-CONSERVATIVE OPTION CLASS C	462266875
6028	VOYA INTERMEDIATE BOND OPTION CLASS A	462266669
6029	VOYA INTERMEDIATE BOND OPTION CLASS C	462266651
6034	VOYA INTERNATIONAL INDEX OPTION CLASS A *	462266594
6035	VOYA INTERNATIONAL INDEX OPTION CLASS C *	462266586
6012	VOYA LARGE CAP GROWTH OPTION CLASS A	462266842
6013	VOYA LARGE CAP GROWTH OPTION CLASS C	462266834
6010	VOYA LARGE CAP VALUE OPTION CLASS A	462266867
6011	VOYA LARGE CAP VALUE OPTION CLASS C	462266859
6016	VOYA MIDCAP OPPORTUNITIES OPTION CLASS A	462266792
6017	VOYA MIDCAP OPPORTUNITIES OPTION CLASS C	462266784
6032	VOYA MONEY MARKET OPTION CLASS A	462266628
6033	VOYA MONEY MARKET OPTION CLASS C	462266610
6038	VOYA MULTI-MANAGER INTERNATIONAL EQUITY OPTION A	462266552
6039	VOYA MULTI-MANAGER INTERNATIONAL EQUITY OPTION C	462266545
6018	VOYA MULTI-MANAGER MID CAP VALUE OPTION CLASS A	462266776
6019	VOYA MULTI-MANAGER MID CAP VALUE OPTION CLASS C	462266768
6030	VOYA SHORT TERM BOND OPTION CLASS A	462266644
6031	VOYA SHORT TERM BOND OPTION CLASS C	462266636
6020	VOYA SMALL COMPANY OPTION CLASS A	462266750
6021	VOYA SMALL COMPANY OPTION CLASS C	462266743
6036	VOYA US STOCK INDEX OPTION CLASS A	462266578
6037	VOYA US STOCK INDEX OPTION CLASS C	462266560
6026	VY BLACKROCK INFLATION PROTECTED BOND OPT CL A	462266685
6027	VY BLACKROCK INFLATION PROTECTED BOND OPT CL C	462266677
6024	VY CLARION GLOBAL REAL ESTATE OPTION CLASS A	462266719
6025	VY CLARION GLOBAL REAL ESTATE OPTION CLASS C	462266693

\* Fund is closed to new investors