



Distribution Checklist for SOAR Virginia® Seniors



It has been our privilege to work with you as a SOAR Virginia Scholar. We look forward to seeing what great things each of you will accomplish in your future!

Prior to using your SOAR Virginia Virginia529 inVESTSM (inVESTSM) account, it is critical that you read the “SOAR Virginia Frequently Asked Questions- Distribution Requests for SOAR Virginia Scholars” that includes information on how to obtain distributions from your SOAR Virginia inVEST account.

Ready to request a distribution?

- Submit a completed inVEST Student Verification Form for SOAR Virginia Scholars. This form allows Virginia529 College Savings PlanSM (Virginia529SM) to disclose your name, Social Security Number and student identification number to colleges, if necessary, to make payment arrangements for tuition and mandatory fees. Please make sure to include your student identification number at the eligible educational institution (college) you will attend.

- Submit a completed inVEST Distribution Request Form for SOAR Virginia Scholars.

Note: If you are graduating this school year, Virginia529 will process your request starting **July 1st** and upon notification from your early commitment advisor that you have completed the pledge requirements for the current school year. Please contact your early commitment advisor to determine if he/she has completed the end of the year certification for you.

Have you moved?

Virginia529 would like to make sure we can reach you if we have questions about your inVEST scholarship account. Please include your current phone number, mailing address and personal email address on the Student Verification Form for SOAR Virginia Scholars, in case Virginia529 has any questions.

You may fax completed forms to Virginia529 toll free at 1-866-757-1295, or mail them to Virginia529 at 9001 Arboretum Parkway, North Chesterfield, Virginia 23236.

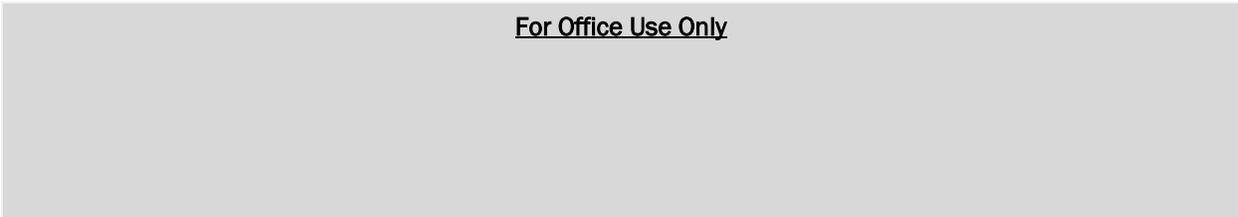
If you have any questions concerning your SOAR Virginia inVEST account, please call Virginia529 toll-free at 1-888-567-0540. On behalf of everyone at Virginia529, congratulations and best wishes for your success in college.

INSTRUCTIONS Use this form to verify Beneficiary (Scholar) information and intentions on school choice for SOAR Virginia scholars. Please see the inVEST Distribution Guide for more information. When reviewing the guide, keep in mind Virginia529 is the owner of the SOAR Virginia inVEST account and the SOAR Virginia scholar is the Beneficiary. Additional forms may be downloaded and printed at Virginia529.com/SOAR.

1	Account Owner and Beneficiary (Scholar) Information												
<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Virginia529 College Savings Plan</td> <td style="width: 50%; border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Account Owner Name</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Beneficiary (Scholar) Name</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">10232028</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">inVEST Account Number(s)</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Beneficiary (Scholar) Social Security Number</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Beneficiary (Scholar) Permanent Address <small>(not temporary school address)</small></td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Beneficiary (Scholar) Telephone Number</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">City, State and Zip Code</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Beneficiary (Scholar) Email Address</td> </tr> </table>		Virginia529 College Savings Plan		Account Owner Name	Beneficiary (Scholar) Name	10232028		inVEST Account Number(s)	Beneficiary (Scholar) Social Security Number	Beneficiary (Scholar) Permanent Address <small>(not temporary school address)</small>	Beneficiary (Scholar) Telephone Number	City, State and Zip Code	Beneficiary (Scholar) Email Address
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2	School Information						
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3	Information Release				
<p>In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA) and other applicable state and federal law, the undersigned Beneficiary authorizes Virginia College Savings Plan and the school listed above to disclose to each other personally identifiable information, including the Beneficiary's Social Security Number, student identification number and any other account or invoice information necessary to process distribution requests. The undersigned certifies that the information provided on this form is true and correct to the best of his or her knowledge. The undersigned also understands that any monies from the SOAR Virginia inVEST account not used for tuition and fees may subject him or her to applicable federal and state taxes and penalties. The undersigned certifies that he or she has read and understands the information disclosed in the inVEST Distribution Guide regarding how to use an inVEST account.</p>					
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PLEASE RETURN THIS FORM TO THE ADDRESS OR FAX NUMBER BELOW

Virginia529 College Savings Plan
9001 Arboretum Parkway • North Chesterfield, Virginia 23236
Phone 804-371-0766 • Toll-Free 1-888-567-0540 • Toll-Free Fax 1-866-757-1295 • Virginia529.com

INSTRUCTIONS Use this form to request a distribution from your SOAR Virginia inVEST account. Complete one distribution request form for each payment you would like Virginia529 to make to the school you will attend. Indicate the exact amount of the distribution requested on this form. **It is your responsibility to maintain adequate documentation that the funds you are requesting were used for qualified higher education expenses for tax purposes.** Please see the inVEST Distribution Guide for more information. When reviewing the guide, keep in mind Virginia529 is the owner of the SOAR Virginia inVEST account and the SOAR Virginia scholar is the beneficiary. Virginia529 is not responsible for payment of any higher education expenses that exceed the current balance of an inVEST account at the time a request is made. Additional forms may be downloaded and printed at Virginia529.com/SOAR.

1 Account Information

Virginia529 College Savings Plan	10232028
Account Owner Name	inVEST Account Number
Beneficiary (Scholar) Name	Beneficiary (Scholar) Student Identification Number
Beneficiary (Scholar) Daytime Phone Number	Beneficiary (Scholar) Email Address

2 Payee Information

Please send this distribution to:

School Name

School Street Address

School City, State, Zip Code

3 Distribution Options

Check here to request 50% of your account balance.

Check here to request a specific dollar amount. \$ _____

Note: During your first year of college, you may only request up to 50% of your account balance.

Check here to request all available funds in your account and close the account.

Please indicate the semester you will begin to use benefits
(choose one):

Fall semester/ quarter Winter quarter

Spring semester/quarter Summer session

For Office Use Only

Portfolio _____

Balance _____

Date _____

Total Amount Approved \$ _____

Processing Approval _____

Banner Approval _____

4 Signature

Certification: I understand that all distributions from SOAR Virginia inVEST Accounts will be made subject to the Pending Settlement Period as described in the "Glossary of Terms" section of the inVEST Program Description. I certify that the information I have provided is true and correct to the best of my knowledge. I also understand that any monies from the SOAR Virginia inVEST account not used for my mandatory tuition and fees may subject me to applicable federal and state taxes and penalties.

Beneficiary (Scholar) Signature Date

PLEASE RETURN THIS FORM TO THE ADDRESS OR FAX NUMBER BELOW



SOAR Virginia® Frequently Asked Questions

Distribution Requests for SOAR Virginia Scholars



How do I withdraw money from my SOAR Virginia inVEST account?

Complete the inVEST Student Verification Form for SOAR Virginia Scholars. This form allows Virginia529 College Savings PlanSM (Virginia529SM) to disclose your name, Social Security Number and student identification number to colleges, if necessary, to make payment arrangements for tuition and mandatory fees. Please make sure to include your student identification number at the eligible educational institution (college) you will attend. You will only need to complete this form one time, unless you change colleges.

You will also need to complete the inVEST Distribution Request Form for SOAR Virginia Scholars. You will need to indicate on this form the exact amount of the distribution requested. During your first year of college, you may only request up to half of the balance in the Virginia529 inVESTSM (inVESTSM) account be paid to your college. After your first year, you may request up to the total balance of funds in the account be paid to your college. For example, if you graduate from high school in Spring 2015 and plan to go to college in Fall 2015, you can only request up to half of the balance, as of July 30, 2015, during your freshman year of college. In your sophomore, junior, or senior year of college, you can take a distribution from your account for a portion of or the entire remaining balance. Of course, you can also choose not to use any of the money in the inVEST account during your freshman year, saving it instead for later in your college career. Whenever you choose to use the money you have been awarded, you will need to complete a separate inVEST Distribution Request Form for SOAR Virginia Scholars for every distribution request.

You may fax completed forms to Virginia529 toll free at 1-866-757-1295, or mail them to Virginia529 at 9001 Arboretum Parkway, North Chesterfield, Virginia 23236.

If you are graduating this school year, Virginia529 will process your request starting **July 1st** and upon notification from your early commitment advisor that you have completed the pledge requirements for the current school year. Please contact your early commitment advisor to determine if he/she has completed the end of the year certification for you.

Where can I get the inVEST Student Verification Form for SOAR Virginia Scholars and the inVEST Distribution Request Form for SOAR Virginia Scholars?

Please see your early commitment advisor for the forms. You may also download and print them from Virginia529.com/soar. Once you have completed the forms, you can either fax them to Virginia529 toll free at 1-866-757-1295 or mail them to Virginia529 at 9001 Arboretum Parkway, North Chesterfield, Virginia 23236.

When should I submit my inVEST Student Verification Form for SOAR Virginia Scholars and the inVEST Distribution Request Form for SOAR Virginia Scholars?

If you are a graduating this school year, Virginia529 will process your request starting **July 1st** and upon notification from your early commitment advisor that you have completed the pledge requirements for the current school year.

The inVEST Distribution Request Form for SOAR Virginia Scholars should be submitted when you are ready to have your SOAR Virginia scholarship funds distributed to the college you are attending. Please submit your request early enough to allow for processing. Whenever you choose to use the money you have been awarded, you will need to complete a separate inVEST Distribution Request Form for SOAR Virginia Scholars for every distribution request. Please remember, it is your responsibility to ensure that your tuition is paid by your college's due date.

The inVEST Student Verification Form for SOAR Virginia Scholars should also be submitted with the inVEST Distribution Request Form for SOAR Virginia Scholars. Please make sure to include your student identification number at the eligible educational institution (college) you will attend.

Please be sure to include your current telephone number and personal email address on both of these forms so that Virginia529 may contact you if we have any questions.

How much will inVEST pay?

Virginia529 will pay directly to the college the amount you request in the inVEST Distribution Request Form for SOAR Virginia Scholars, up to the balance of your inVEST account. During the first year of college the SOAR Virginia Scholar can only request up to half of his/her balance of the inVEST account. In your sophomore, junior, or senior year of college, you can take a distribution from your inVEST account for a portion of or the entire remaining balance.

If you request an amount that is more than the amount you are eligible for, Virginia529 will only process a distribution for the dollar amount you are eligible. For example, if your inVEST account balance is \$2000 and you request a \$1500 distribution, but it is your first year of college, then Virginia529 will only process the request for half of your inVEST account balance at the time your request is received. In this case, Virginia529 will process your distribution for \$1000.

How long will it take to process my distribution after you receive my inVEST Distribution Request Form for SOAR Virginia Scholars?

As long as Virginia529 has a complete and up-to-date inVEST Student Verification Form for SOAR Virginia Scholars, properly completed SOAR Virginia inVEST distribution requests will be processed within 10 business days of receipt.

Please be aware that the Virginia Community College System expects payment by Friday of the week that you register. It is your responsibility to ensure that your tuition is paid by your college's due date.

How are payments made?

You must submit a separate inVEST Distribution Request Form for SOAR Virginia Scholars for each distribution request, indicating the college to which Virginia529 will directly make the payment. Virginia529 makes payments either electronically or by check directly to the college for application to your student account.

The monies are sent in the form of an inVEST distribution paid directly to the college business office. The payment is not referred to as a SOAR Virginia Scholarship at the colleges. Each college processes the payments differently. Please check with your college business office if you notice that the inVEST distribution has not been applied to your student account within 10 business days of submitting your distribution request.

What if I submitted my inVEST Student Verification Form for SOAR Virginia Scholars to Virginia529 for one year that I attended an out of state school and my second year I want to attend a school in the state of Virginia?

Please submit a new inVEST Student Verification Form for SOAR Virginia Scholars as soon as you have an official student identification number from the eligible educational institution in Virginia.

You will also need to send in a new inVEST Distribution Request Form for SOAR Virginia Scholars with the updated eligible educational institution information so that Virginia529 may process a distribution for the new school.

Who do I call if I have questions?

Please contact your early commitment advisor for more questions concerning how to obtain and complete your inVEST Student Verification Form for SOAR Virginia Scholars and inVEST Distribution Request Form for SOAR Virginia Scholars. If you have further questions regarding SOAR Virginia inVEST distributions or payout information, please contact Virginia529 customer service toll-free at 1-888-567-0540.

For more information on the Virginia529 inVEST program, please see the Virginia529 inVEST Program Description and the inVEST Distribution Guide available at Virginia529.com/invest. When reviewing all program materials, keep in mind Virginia529 is the owner of all SOAR Virginia inVEST accounts and the SOAR Virginia Scholar is the beneficiary of his/her inVEST account.

Select information is presented in summary form for convenience. Visit Virginia529.com/SOAR/ for complete program details.