

2023 Schedule OR-529

Oregon Department of Revenue

**Oregon College Savings Plan Direct Deposit and Account Creation Election
for Individual Income Tax Filers**

Page 1 of 2 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Last name

Social Security number (SSN)

Instructions. Use this schedule to deposit your refund in up to four existing Oregon College Savings Plan or MFS 529 Savings Plan accounts or to elect to share your information with the Oregon 529 Savings Board for the purpose of establishing an Oregon College Savings Plan account. For more information, see Schedule OR-529 Instructions.

Part 1: Oregon College Savings Plan Direct Deposit.

1. Check one: 1a. Oregon College Savings Plan; or 1b. MFS 529 Savings Plan
1c. Portfolio number 1d. Account number

1e. Amount.....1e.

2. Check one: 2a. Oregon College Savings Plan; or 2b. MFS 529 Savings Plan
2c. Portfolio number 2d. Account number

2e. Amount.....2e.

3. Check one: 3a. Oregon College Savings Plan; or 3b. MFS 529 Savings Plan
3c. Portfolio number 3d. Account number

3e. Amount.....3e.

4. Check one: 4a. Oregon College Savings Plan; or 4b. MFS 529 Savings Plan
4c. Portfolio number 4d. Account number

4e. Amount.....4e.

5. **Total.** Add lines 1e–4e. Enter the total on Form OR-40, line 51;
Form OR-40-N, line 75; or Form OR-40-P, line 74 5.

Page 2 of 2 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

Part 2: Oregon College Savings Plan Account Creation Election.

Taxpayer email

Beneficiary first name Initial Beneficiary last name

Beneficiary Social Security number (SSN) Beneficiary date of birth (MM/DD/YYYY) Relationship code (see instructions)

Beneficiary address (no PO Box)

City State ZIP code

Sign here. I authorize the Department of Revenue to release information to the Oregon 529 Savings Board for the purpose of establishing an Oregon College Savings Plan Account.

Taxpayer signature

X

Date (MM/DD/YYYY)

— You must include this schedule with your Oregon income tax return —