

# Employee Payroll Deduction Form



## Instructions

Please complete this form to establish, change or delete payroll deduction instructions on your existing The Education Plan® account(s). If you are setting up payroll deduction for a new account, complete and attach a separate application for each beneficiary. Before completing this form, check with your payroll department regarding the availability of this service. Your payroll department must complete an Employer Authorization Payroll Deduction Form before you can begin payroll deduction.

Please print clearly in all CAPITAL LETTERS using black ink. Color in circles completely. For example: ● not ⊗ not ⊙

If you have any questions about this form, please call **1.877.EdPlan8 (1.877.337.5268)**.

### 1 | Employee/Company Information

Employee's first name	Middle initial	Last name	Social Security number
			- -
Employee's phone number	Employee's email address		
			( ) - -
Company name	Company phone number		
Company contact			

### 2 | Payroll Deduction Information

- A. ☐ Establish a new payroll deduction ☐ Cancel existing deduction  
☐ Change allocation percentage

#### B. Payroll Deduction Amount

Indicate the amount to be deducted from your paycheck each pay period. The minimum investment is \$25 per month per portfolio.

Total Deduction Amount \$ \_\_\_\_\_

This dollar amount will be invested according to your Elected Investment Allocation on file at the time the assets are received. If you are establishing a new account, the assets will be invested according to your instructions on the Account Application.

All dollar allocations will be stored as percentages. Payroll dollars will be invested based on the stored percentages until the account owner submits a new form.

Account number	Beneficiary's name	Percentage of deduction to be allocated to each account (full % only)
		.00%
		.00%
		.00%
		.00%
<b>Total</b>		100.00%

*Continued on next page*

### 3 | Authorized Signature

Employee's Signature \_\_\_\_\_

Date \_\_\_\_\_

All Employees

Make two copies of this Employee Payroll Deduction Form and:

1. Retain a copy for your records.
2. Provide a copy of this form to your Human Resources Department once you obtain your Education Plan account number so they can initiate the payroll deduction.
3. Your Human Resources Department will send a copy of the Form to The Education Plan® at:

The Education Plan®  
P.O. Box 173691  
Denver, CO 80217



**OppenheimerFunds®**  
Distributor, Inc.

**The Education Plan® is operated as a qualified tuition program offered by The Education Trust Board of New Mexico and is available to all U.S. residents. OFI Private Investments Inc., a subsidiary of OppenheimerFunds, Inc., is the program manager for The Education Plan® and OppenheimerFunds Distributor, Inc. is the distributor of The Education Plan®.**

The Education Plan® is distributed by OppenheimerFunds Distributor, Inc. Member FINRA, SIPC  
225 Liberty Street, New York, NY 10281-1008

The Education Plan® and The Education Plan® logo are registered trademarks of The Education Trust Board of New Mexico used under license.

**EP0000.126.1015 October 28, 2015**