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my529.org

2018 Utah state tax benefits information and year-end deadlines

Utah taxpayers can save on Utah state income taxes while saving for education. Contributions to a my529 account qualify for a Utah state income tax credit or deduction, up to the amounts in the table below.

2018 Utah State Income Tax Benefits

Tax Filer	my529 Account Type	2018 Maximum Allowable Contribution for a Utah State Income Tax Benefit	2018 Maximum Utah State Income Tax Credit per Beneficiary (5%)
Single	Individual	$1,960	$98
Joint	Individual	$3,920	$196
Trusts	Institutional	$1,960	$98
Grantor Trust, Married Filing Jointly	Institutional	$3,920	$196
Flow Through Entity	Institutional	$1,960	$98
Corporation	Institutional	$1,960	$1,960*

*deduction

Calculate your my529 income tax credit:

1. Multiply contribution amounts by 5 percent for each qualified beneficiary.
2. Add totals from each beneficiary.

A corporation may deduct up to $1,960 per beneficiary from its income.

You qualify for the tax benefits even if you contribute more or less than the maximum amounts. If someone else contributes to your my529 account, you will receive the tax credit as the account owner.

Meet year-end deadlines to claim tax benefits for 2018 contributions to your my529 account.

2018 Year-End Deadlines

Transaction	Online Process Deadline	Manual Process Deadline[1]
Contributions	Monday, December 31, 2018	Monday, December 31, 2018
New Accounts	Monday, December 31, 2018	Monday, December 31, 2018
Withdrawals	Monday, December 31, 2018	Monday, December 31, 2018
Investment Option Change	Monday, December 31, 2018	Monday, December 31, 2018
Incoming Rollovers (money received)	N/A	Monday, December 31, 2018
Transfers (between accounts with the **same** account owner)	Monday, December 31, 2018	Monday, December 31, 2018
Transfers (between accounts with **different** account owners)	N/A	Monday, December 31, 2018
Outgoing Rollovers	N/A	Friday, December 14, 2018
Please Note the Times	Must be received by my529 before 11:59 p.m., MT.	Mailed or hand-delivered documents must be received by my529 before 5 p.m. MT. Faxes must be received before 6 p.m. MT.

[1] A mailed contribution postmarked on or before the December 31, 2018, deadline but received in 2019 will be recorded as a 2019 tax-year contribution.
All documents must be in good order—accurate, proper, legible, and complete.

See the Program Description for more information.

After printing the completed form, close your browser to protect your personal information.

my529™

Clear form

For my529 Use Only

my529 ID No. ______________________

Date Received/Initials ______________________

Date Processed/Initials ______________________

Form 800
Individual Limited Power of Attorney Registration

ABOUT THIS FORM

- Use this form to register an individual who may be granted limited power of attorney authority with my529 and receive a LPOA Number.
- To register an entity that may be granted limited power of attorney authority, complete an Entity Limited Power of Attorney Registration form (Form 700) instead of this form.
- You only need to submit this form once to my529.
- my529 cannot and does not provide legal, financial, or tax advice. Accordingly, you should consult your legal advisor if you have any questions concerning the consequences of submitting this form.

NEXT STEPS

- Upon successful processing of this form, my529 will send you a registration confirmation email. The email will provide instructions on how to view your LPOA Number and set up online access at advisor.my529.org.
- Provide your LPOA Number to each account owner/agent who grants you limited power of attorney authority using the Individual Limited Power of Attorney Authorization form (Form 810). The number is required to complete Form 810.

SUBMITTING THIS FORM

- Please print clearly—preferably in capital letters, using black or blue ink. To ask questions about completing this form, contact my529 toll-free at 888.529.1886 on business days from 7 a.m. to 6 p.m. MT.
- Return this form to: my529, PO Box 145100, Salt Lake City, UT 84114-5100. For delivery by overnight carrier, send to: my529, Board of Regents Building, Gateway 2, 60 South 400 West, Salt Lake City, UT 84101-1284. You may also fax this form to 888.529.9197.

1 Individual Information

Check the box that applies to you, the individual who may be granted limited power of attorney authority:

☐ **Financial Advisor** ☐ **Attorney** ☐ **Accountant**

☐ **Family Member/Friend** ☐ **Other** If other, please describe: ______________________

Individual's Name (Last, First) ______________________

U.S. Social Security Number or Taxpayer Identification Number ______________________

IARD/CRD Number (if applicable) ______________________

SEC Number (if applicable) ______________________

Mailing Address ______________________

City ______ State ______ ZIP Code ______

Physical Address (if mailing address is a PO Box) ______________________

City ______ State ______ ZIP Code ______

(   ) Phone Number ______________________

(   ) Fax Number ______________________

Email Address ______________________

2 Signature Authorization (Required)

- *By signing below, I certify and agree to register as an individual who may be granted limited power of attorney authority for designated my529 accounts as specified in the Individual Limited Power of Attorney Authorization form(s) (Form 810).*
- *I certify that I have the power and authority to sign this application.*
- *I understand that this form does not impose a duty on me to exercise any granted limited power of attorney authority; however, when I exercise such authority, I will be responsible for any resulting consequences of such actions, must use due care to act for the account owner/agent's benefit in accordance with the limited power of attorney authorization, and will be responsible for maintaining records relating to such actions.*
- *I understand that the signature provided below will be used to validate certain transactions.*

Required

Remember to sign here after printing

Signature of the Individual ______________________

Name of the Individual (please print) ______________________

Date (mm/dd/yyyy) ______________________

Click here to print