my529®

PO Box 145100, Salt Lake City, UT 84114-5100
Phone 801.321.7188 • Toll-free 800.418.2551
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 Account ID No. ____________________

Date Received/Initials ____________________

Date Processed/Initials ____________________

Form 820
Individual Limited Power of Attorney Revocation

ABOUT THIS FORM

- Use this form to revoke an individual's limited power of attorney authority for your selected my529 accounts. You can also revoke the individual's limited power of attorney authority online at my529.org.

NEXT STEPS

- To revoke any limited power of attorney authorization on file with my529 and grant a new limited power of attorney authority for the **same** accounts, please submit a new Limited Power of Attorney Authorization form (Form 710 or 810) instead of this form.
- If the account owner/agent is changed on a my529 account, the limited power of attorney authorization associated with that account will be terminated immediately; this form is not required to be submitted.

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 Account Owner/Agent Information

U.S. Social Security Number **OR** Taxpayer Identification Number

Last Name First Name Middle Name

( )

Daytime Phone Number Email Address

2 my529 Account Selection Information

Complete section 2A or 2B to specify the my529 accounts for which you are revoking an individual's limited power of attorney authorization.

A. Revoke Limited Power of Attorney for Accounts for All Beneficiaries

☐ **Check this box to revoke limited power of attorney authority for ALL my529 accounts for ALL beneficiaries for which you are the account owner/agent.**

OR

B. Revoke Limited Power of Attorney for Accounts for Selected Beneficiaries

Provide beneficiary information below to revoke limited power of attorney authority for all my529 accounts for which you are the account owner/agent for each of the listed beneficiaries.

Beneficiary's Name (Last, First) Date of Birth (mm/dd/yyyy) U.S. Social Security Number or Taxpayer Identification Number

Beneficiary's Name (Last, First) Date of Birth (mm/dd/yyyy) U.S. Social Security Number or Taxpayer Identification Number

Beneficiary's Name (Last, First) Date of Birth (mm/dd/yyyy) U.S. Social Security Number or Taxpayer Identification Number

Beneficiary's Name (Last, First) Date of Birth (mm/dd/yyyy) U.S. Social Security Number or Taxpayer Identification Number

If the number of beneficiaries exceeds the space available, attach a separate page showing the information requested in this section for the additional beneficiaries.

3 Account Owner/Agent Signature

This revocation will remain in effect until my529 receives a new Limited Power of Attorney Authorization form (Form 710 or 810) from you, the account owner/agent.

By signing below, I hereby revoke any limited power of attorney authorization on file with my529 for the accounts specified in section 2 of this form.

Required

Remember to sign here after printing

Signature of Account Owner/Agent Name of Account Owner/Agent (please print) Date (mm/dd/yyyy)

Click here to print