

Application for Tax Year 2011

Applications will be accepted beginning January 2, 2012 and must be postmarked no later than April 30, 2012.

Participant Name	Participant Social Security
Beneficiary Name	Beneficiary Social Security
CollegeBoundfund [®] Account Number	Total 2011 CollegeBoundfund Contribution

1. Is the CollegeBoundfund Participant a resident of the state of Rhode Island? Yes No
2. Can the Participant claim the CollegeBoundfund Beneficiary as a dependent for income tax purposes? Yes No
3. Was the Beneficiary 10 years old or younger when you opened your CollegeBoundfund account? Yes No
If you answered NO to question 1, 2 or 3 you are not eligible to participate in the Matching Grant Program.
4. Did you make a contribution to your CollegeBoundfund account in Year 2011? Yes No
If you answered NO to question 4, you are not eligible for matching grants in 2011. Contributions must be made in the year for which you apply for grants, however, you may be eligible for matching grants in future years. Please call 1.866.348.3836 for the appropriate year's application.
5. What is your family's Adjusted Gross Income (AGI) as stated on your 2011 federal income tax return? \$ _____

Contribution Matches are based on federal Adjusted Gross Income (AGI)

Level 1—Adjusted Gross Income of \$72,000 or less: If your AGI falls within this range, the Matching Grant Program will match \$2 for every \$1 you contributed to your child's CollegeBoundfund account during 2011. Participants eligible for a \$2 for \$1 match may receive up to \$1,000 in matching grant funds for the specified year.*

Level 2—Adjusted Gross Income of \$72,001 to \$87,000: If your AGI falls within this range, the Matching Grant Program will match \$1 for every \$1 you contributed to your child's CollegeBoundfund account during 2011. Participants eligible for a \$1 for \$1 match may receive up to \$500 in matching grant funds for the specified year.*

* Subject to the availability of funds.

6. I am applying for CollegeBoundfund Matching Grant funds for Tax Year 2011 and understand I remain eligible for Matching Grants for contributions made during a period not to exceed five consecutive years, if I continue to meet the program requirements.

Income verification, please note: All families are required to submit paperwork for income verification with this application.

You (Participant) must include a signed copy of your 2011 federal income tax return. If you (Participant) are not required to file a tax form, please provide documentation.

Statement of accuracy: I attest that all information provided above is accurate to the best of my knowledge and I have read and agree to all the terms and conditions listed in the CollegeBoundfund Matching Grant Program Description. I also understand that in the event it is revealed that I provided any false information, the Rhode Island Higher Education Assistance Authority (RIHEEA) shall immediately revoke the matching grant award.

Participant Signature			
Print Name	Daytime Phone	Home Phone	
Street Address	City	State	Zip Code

To apply for the CollegeBoundfund Matching Program, please send this completed application and appropriate income verification to:

CollegeBoundfund Matching Grant Program
c/o RIHEEA
560 Jefferson Blvd., Suite #100
Warwick, RI 02886 1304
1.866.348.3836

FOR OFFICE USE ONLY: <input type="checkbox"/> Eligible <input type="checkbox"/> Not Eligible
Match ratio: <input type="checkbox"/> Level 1 (\$2 for \$1) <input type="checkbox"/> Level 2 (\$1 for \$1)
Match amount:
RIHEEA authorization:

Participant Application Checklist

- Did you read the entire Matching Grant Program Description before signing the Matching Grant Application?
- Did you fill in your name and Social Security number as Participant?
- Did you fill in your CollegeBound*fund* account number?
- Did you fill in your Beneficiary's name and Social Security number?
- If applicable, did you fill in your contribution for Year 2011?
- Do you have a signed copy of your federal income tax return or other income verification to send with your Matching Grant Application?
- Remember to send in your Matching Grant Application for Tax Year 2011 between January 2, 2012 and April 30, 2012. All applications must be postmarked by April 30, 2012.

CollegeBound*fund* Matching Grant Program

c/o RIHEAA

560 Jefferson Blvd., Suite #100

Warwick, RI 02886 1304

If you have any questions completing this application, please call toll free
1.866.348.3836, Monday through Friday 8:30 am through 4:00 pm EST.

