COVERDELL ESA
CONTRIBUTION DIRECTION (FORM 2515E)

Please Print or Type

____ ____ ____ ____ ____
CUID **(Credit union will complete.)**

Credit Union Name

____ ____ ____ - ____ ____ - ____ ____ ____ ____ - ____ ____
Designated Beneficiary's Social Security Number ESA Suffix

Designated Beneficiary's Name (First, Initial, Last)

Account Number

CONTRIBUTOR INFORMATION

Contributor's Name (First, Initial, Last)

Contributor's Street Address

___ ____ ____ - ____ ____ - ____ ____ ____ ____
Contributor's Social Security Number

Contributor's Address (City, State, ZIP Code)

GENERAL INFORMATION

A contribution made to a Coverdell ESA from January 1 through the tax return due date (usually April 15) can be treated either as a contribution for the current year or as a contribution for the preceding year.

We are required to report to the IRS how you want to treat each contribution made during this time period.

Please tell us the tax year to which your contribution applies by completing and signing this form.

Do not complete this form for direct transfers or rollover contributions.

CONTRIBUTION AMOUNT AND TAX YEAR

$
Amount of Contribution

Tax Year to Which Contribution Applies (YYYY)

CONTRIBUTOR'S SIGNATURE

Contributor's signature is required for all contributions.

X
Contributor's Signature

Date (MM/DD/YYYY)

For Credit Union Use Only

Name of Credit Union Employee Who Took Deposit

Date of Deposit (MM/DD/YYYY)

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