



# Fort Kids First Kindergarten

FOR FUTURE HIGHER EDUCATION

A college savings account is a great start for a bright future! That's why the Town of Fort Fairfield created **Fort Kids First Kindergarten**. The parent or legal guardian of any Fort Fairfield resident child attending kindergarten may be eligible to receive a \$50 contribution to a new or existing NextGen 529™ account.

## 3 STEPS

to receive \$50 from the town of Fort Fairfield

- 1 If you don't already have a NextGen 529 account for your kindergartner, open a NextGen 529 Client Direct Series account online at NextGenforME.com. Or, you can open a NextGen 529 Client Select Series account by contacting your financial advisor.
- 2 Bring the completed Voucher\* (attached below) including the NextGen 529 account number, to the **Fort Fairfield Town Office**, 18 Community Center Drive.
- 3 The Town Treasurer's Office will mail the check directly to FAME to forward to the NextGen 529 Program Manager for contribution into the account. (Please allow processing time).

\* Vouchers for kindergartners must be redeemed during the school year on or before June 30th.



# \$50 for your child's future

## Voucher

I am the parent or legal guardian for:		
Youth Name (First Middle Last):		Youth Date of Birth:
Parent/Legal Guardian Name (First Middle Last):		Daytime Phone Number:
Mailing Address		Email Address
City	State	Zip
		NextGen 529 account number
I have read the Guidelines and accept the terms and conditions required to receive the Fort Kids First contribution. I certify the youth named herein is a resident of Fort Fairfield attending kindergarten.		
Signature of Parent/Legal Guardian	Date:	<b>For Town Use:</b> Voucher complete? Y N Initials _____

# Fort Kids First Kindergarten

## GUIDELINES

**Fort Kids First Kindergarten Contribution:** NextGen 529™ (NextGen) has been selected as the investment vehicle for the Future Higher Education Initiative. The Fort Fairfield Education Fund will provide a one-time \$50 contribution into a NextGen account naming a Fort Fairfield resident kindergarten child as account beneficiary. The contribution can be made to a new or existing NextGen account naming the Fort Fairfield kindergarten as account beneficiary.

**To qualify:** The youth must be a resident of Fort Fairfield attending kindergarten. Vouchers issued for kindergartners must be redeemed on or June 30th of the kindergarten school year. Only one contribution will be made per eligible youth.

A Fort Kids First Kindergarten voucher will be available to the parent or guardian, entitling an eligible kindergartner to receive a \$50 contribution into a NextGen account naming the child as the account beneficiary. To redeem the voucher, the parent or guardian must hand deliver the completed voucher, including the NextGen account number, to the Fort Fairfield Town Office. The Town Treasurer's Office will prepare a check made payable to "NextGen FBO [beneficiary name]" and send the check to the Finance Authority of Maine (FAME) to forward to the NextGen Program Manager for processing into your account.

**Privacy:** The Town of Fort Fairfield reserves the right to make the name of the contribution recipients and the parents or guardians available to the public. No other personal identifying information will be made available to the public. Please also read the privacy policy in the NextGen 529 Program Description.

**Opening a NextGen Account:** Opening a NextGen account is subject to acceptance of the NextGen Account Application by the NextGen Program Manager (Merrill Lynch, Pierce, Fenner & Smith Incorporated), including verification of identity and other information in compliance with the requirements of the USA PATRIOT Act and other applicable laws.

NextGen offers the Client Direct Series for self-directed investors and the Client Select Series for investors who want the assistance of a financial advisor. For more information about opening a NextGen account, visit [NextGenforME.com](http://NextGenforME.com).

*NextGen 529 is a Section 529 plan administered by the Finance Authority of Maine (FAME). Before you invest in NextGen 529, request a NextGen 529 Program Description from your Merrill Advisor or Maine Distribution Agent or call Merrill Edge at 1-877-463-9843 and read it carefully. The Program Description contains more complete information, including investment objectives, charges, expenses and risks of investing in NextGen 529, which you should carefully consider before investing. You also should consider whether you or your designated beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in such state's 529 plan. Merrill Lynch, Pierce, Fenner & Smith Incorporated, a registered broker-dealer, member SIPC, is the program manager and underwriter.*



**Hand deliver completed Voucher to:**

Fort Fairfield Town Office  
18 Community Center Drive  
Fort Fairfield, ME 04742  
For questions, call (207) 472-3800

**Investing of Contribution Funds:** The Fort Kids First Kindergarten contribution will be invested into the NextGen Portfolio(s) currently selected by the NextGen account owner. All contributions made into the NextGen Account are subject to the terms and conditions of the NextGen Program Description and any Supplements. Please remember there is always the potential of losing money when you invest in securities, including the value of this contribution.

**Tax Consequences:** NextGen account owners and beneficiaries should consult their own tax advisors regarding state and federal tax treatment applicable to NextGen accounts. Any earnings withdrawn from a NextGen account that are not used for qualified higher education expenses may be subject to federal income tax and may be subject to a 10% additional federal tax as well as state and local income taxes. Account owners should consult with their tax advisors regarding the tax consequences, if any, associated with receiving account contributions from a third party.

**Grants for Maine Residents:** Recipients of the Fort Kids First Kindergarten contribution may be entitled to receive Grants for Maine Residents. Grants are linked to eligible Maine accounts. See Terms and Conditions of Maine Grant Programs for other requirements and restrictions that may apply at [NextGenforME.com](http://NextGenforME.com).

**The Town of Fort Fairfield is not an authorized distributor of NextGen.**



**For questions about NextGen 529™:**

[NextGenforME.com](http://NextGenforME.com)  
800-228-3734  
[NextGen@FAMEmaine.com](mailto:NextGen@FAMEmaine.com)

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