



PO Box 85298  
Lincoln, NE 68501  
877.432.7444  
BrightStart.com

**Account Owner:** Sruthi R Nalabolu  
**SSN:** XXX-XX-X329  
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## Contribution Summary

Beneficiary	Account Number	Contributions	Rollover Contributions In	GiftED Contributions	Credit Card Rewards
Aaruhi K Rojanala	853008251	\$6,000.00	\$0.00	\$0.00	\$0.00
Krithi K Rojanala	853074014	\$1,000.00	\$0.00	\$0.00	\$0.00
<b>Total</b>		<b>\$7,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

### IMPORTANT INFORMATION

This "Contribution Summary" is provided for the convenience of the account owner. **This is NOT a tax document and is intended for informational purposes only.** PLEASE REVIEW your bank records and account statements to determine your total 2023 contributions.

#### Definitions:

##### 1. Contributions

- Contributions to an account during calendar year 2023.
- Plus, contributions postmarked on or before December 31, 2023, but received by Bright Start after January 1, 2024 (2023 "Prior Year Contributions").
- Less, contributions postmarked on or before December 31, 2022, but received by Bright Start after January 1, 2023 (2022 "Prior Year Contributions").
- Make sure to REDUCE the amount for any contributions made by non-account owners (Contributions by non-account owners are generally deductible by the individual making the contribution - not by the account owner).
- Does NOT include "Rollover Contributions In", "GiftED Contributions", and "Bright Start 529 Visa® Rewards."

##### 2. Rollover Contributions In

- Includes the "basis or principal portion" only of a qualified rollover contribution into Bright Start from an out-of-state 529 plan.
- Includes a rollover into Bright Start from a Coverdell Education Savings Account.
- Includes U.S. savings bond liquidation proceeds contributed to Bright Start.

##### 3. GiftED Contributions

- GiftED contributions received into the account.
- Generally, GiftED contributions are made by non-account owner and are therefore NOT deductible by the account owner.

##### 4. Credit Card Rewards

- Rewards contributed to the account earned with the Bright Start 529 Visa ® Rewards card.

For complete transaction details, please visit BrightStart.com and view "Transaction Activity" which will show transaction dates, transaction types, and contribution dollar amounts. Make sure to review and adjust total contributions for any "PRIOR YEAR" contributions as described above.