Schedule CT-CHET

Connecticut Higher Education Trust (CHET) 529 College Savings Plan Contribution

2020

Your Social Security Number ● ___ – ___ – ___

Complete this schedule in blue or black ink only. Please note that each form is year specific. To prevent any delay in processing your return, the correct year's form must be submitted to the Department of Revenue Services (DRS). Attach completed Schedule CT-CHET to the back of your Connecticut return. Do not use staples.

Complete **Schedule CT-CHET** to contribute all or part of your Connecticut individual income tax overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) to a CHET College Savings Plan Account(s). You **must** provide the following information to identify the CHET Plan, account number, and beneficiary. Before completing this schedule, review the most recent CHET Account Statement to correctly identify all account information. See instructions on back page.

If you have not yet obtained your Fidelity CHET account number, please visit **www.fidelity.com/chetactivate** for details.

For more information about CHET account(s), contact:
Fidelity Investments
Call - **1-800-544-1914**
Internet - **www.aboutchet.com**

Beneficiary #1

Beneficiary 1 - First name | MI | Last name (If two last names, insert a space between names.)

Fidelity Investments Account Number 3 9 9 0 0 0 0 1

1. **Amount of contribution:** Identify the amount of your Connecticut overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) you elect to contribute to Beneficiary 1. This contribution is irrevocable. 1. .00

Beneficiary #2

Beneficiary 2 - First name | MI | Last name (If two last names, insert a space between names.)

Fidelity Investments Account Number 3 9 9 0 0 0 0 1

2. **Amount of contribution:** Identify the amount of your Connecticut overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) you elect to contribute to Beneficiary 2. This contribution is irrevocable. 2. .00

Beneficiary #3

Beneficiary 3 - First name | MI | Last name (If two last names, insert a space between names.)

Fidelity Investments Account Number 3 9 9 0 0 0 0 1

3. **Amount of contribution:** Identify the amount of your Connecticut overpayment (**Form CT-1040**, Line 22; **Form CT-1040NR/PY**, Line 24.) you elect to contribute to Beneficiary 3. This contribution is irrevocable. 3. .00

4. **Total CHET Individual Savings Plan contribution(s):** Add **Schedule CT-CHET**, Lines 1, 2, and 3. Enter here and on **Form CT-1040**, Line 24, or **Form CT-1040NR/PY**, Line 26. 4. .00

See instructions.

Schedule CT-CHET - Instructions

This schedule **must** be attached to the back of Form CT-1040 or Form CT-1040NR/PY.

General Instructions

Contributions must be made into existing Connecticut Higher Education Trust (CHET) 529 College Savings Plans.

You can only make contributions to a total of three (3) CHET accounts. If the same beneficiary has more than one account, you must enter the contributions as separate beneficiaries.

Contributions are irrevocable.

Any contribution that is rejected for deposit by either fund will be returned to DRS and a refund will be issued to you in the form of a paper check.

If you have an overpayment and are due a refund, all or part of your overpayment may be used to pay outstanding debts or taxes first. Your overpayment will be applied in the following order:

1. Penalty and interest you owe DRS;
2. Taxes you owe DRS;
3. Debts to other Connecticut state agencies;
4. Federal taxes you owe the Internal Revenue Service;
5. Taxes you owe to other states;
6. Amounts designated by you to be applied to your 2021 Connecticut estimated tax; **and**
7. CHET and designated charitable contributions.

If your CHET contribution is reduced, you will receive an explanation.

Completing the Schedule

Beneficiary's Name
Enter the beneficiary's first name, middle initial, and last name, as it appears on the account statement.

CHET Account Number
Enter the account numbers identified on the account statement. Use the Fidelity prefix 39900001 followed by your 9-character Fidelity brokerage or 529 plan account number. To determine the portion of the Fidelity Investments Account Number that must be completed by the taxpayer, visit **www.fidelity.com/tax-information/direct-deposit**.

Lines 1, 2, and 3
Enter the amount of your contribution for each beneficiary on Lines 1, 2, and 3.

Line 4
Add Lines 1, 2, and 3. Your total contributions must be equal to or less than your Connecticut overpayment (Form CT-1040, Line 22; Form CT-1040NR/PY, Line 24.).

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