

**PRIVATE
COLLEGE 529 PLAN**

by CollegeWell

PO Box 44036 • Jacksonville, FL 32231

B4
P: 181

January 12, 2023

303 1 MB 0.512 3 135647 1 1
*****AUTO**MIXED AADC 601RIYA SENTHIL
110 GALWAY CIR
CHALFONT PA 18914-3900**Instructions for Recipient**

Distributions from Coverdell education savings accounts (CESAs) under section 530 and qualified tuition programs (QTPs) under section 529, including rollovers, may be taxable. Nontaxable distributions from CESAs and QTPs are not required to be reported on your income tax return. You must determine the taxability of any distribution. See Pub. 970 and the Instructions for Forms 1040 and 1040-SR for more information. Also see Form 5329 and its separate instructions.

Recipient's taxpayer identification no. (TIN). For your protection, this form may show only the last four digits of your TIN (SSN, ITIN, ATIN, or EIN). However, the payer or trustee has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the payer has assigned to distinguish your account.

Box 1. Shows the gross distribution (including in-kind distributions) paid to you this year from a QTP or a CESA. This amount is the total of the amounts shown in boxes 2 and 3. See Pub. 970 for more information.

Caution: For CESA distributions (other than earnings on excess contributions) made during the calendar year, the payer/trustee is not required to report amounts in boxes 2 and 3. Instead, the payer/trustee may report the fair market value of the CESA as of December 31 of the calendar year in the blank box below boxes 5 and 6. To figure your earnings and basis, use the Coverdell ESA—Taxable Distributions and Basis worksheet in Pub. 970.

Box 2. Shows the earnings part of the gross distribution shown in box 1. Generally, amounts distributed that are used to pay for qualified education expenses, transferred between trustees, or rolled over to another qualified education program or to an ABLE account, within 60 days, are not included in income.

Under a QTP, the amount in box 2 is included in income if there has been (a) more than one transfer or rollover within any 12-month period with respect to the same beneficiary, or (b) a change in the designated beneficiary and the new designated beneficiary is not a family member.

Under a CESA, the amount in box 2 is included in income if there has been a change in the designated beneficiary and the new designated beneficiary is not a family member or is over age 30 (except for beneficiaries with special needs).

Also, an additional 10% tax may apply to part or all of any amount included in income from the CESA or QTP. See Form 5329 and your tax return instructions for more information.

If a final (total) distribution is made from your account and you have not recovered your contributions, see Pub. 970 to determine if you have a deductible loss and how to claim it.

Box 3. Shows your basis in the gross distribution reported in box 1.

Box 4. This box is checked if a trustee-to-trustee transfer was made from one QTP to another QTP, from one CESA to another CESA, from a CESA to a QTP, or from a QTP to an ABLE account. However, in certain transfers from a CESA, the box will be blank.

Box 5. Shows whether the gross distribution was from a QTP (private or state) or from a CESA.

Box 6. The designated beneficiary is the individual named in the document creating the trust or custodial account to receive the benefit of the funds in the account. If you are not the designated beneficiary, see Pub. 970 and the Instructions for Forms 1040 and 1040-SR.

Distribution codes. For the calendar year, the payer/trustee may, but is not required to, report (in the box below boxes 5 and 6) one of the following codes to identify the distribution you received: 1—Distributions (including transfers); 2—Excess contributions plus earnings taxable in the calendar year; 3—Excess contributions plus earnings taxable in the prior calendar year; 4—Disability; 5—Death; or 6—Prohibited transaction.

Future developments. For the latest information about developments related to Form 1099-Q and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form1099Q.

☐ CORRECTED (if checked)

PAYER'S/TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Private College 529 Plan PO Box 44036 Jacksonville, FL 32231		1 Gross distribution	OMB No. 1545-1760
		\$11,470.98	2022
		2 Earnings	
		\$1,968.70	
PAYER'S/TRUSTEE'S TIN 20-0172859	RECIPIENT'S TIN XXX-XX-2567	3 Basis \$9,502.28	4 Trustee-to-trustee transfer <input type="checkbox"/>
RECIPIENT'S name RIYA SENTHIL Street address (including apt. no.) 110 GALWAY CIRCLE City or town, state or province, country, and ZIP or foreign postal code CHALFONT PA 18914		5 Distribution is from: • Qualified tuition program — Private <input checked="" type="checkbox"/> or State <input type="checkbox"/> • Coverdell ESA <input type="checkbox"/>	6 If this box is checked, the recipient is not the designated beneficiary <input type="checkbox"/>
		If the fair market value (FMV) is shown below, see Pub. 970, Tax Benefits for Education, for how to figure earnings.	
Account number (see instructions) 5290114878			

**Payments From
Qualified
Education
Programs
(Under Sections
529 and 530)****Copy B
For Recipient**

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Form 1099-Q

(keep for your records)

www.irs.gov/form1099q

Department of the Treasury - Internal Revenue Service

Nevada College Savings Trust Fund
The Vanguard 529 College Savings Plan
PO Box 55111
Boston, MA 02205-5111

35
P: 181



Ramya Balaram
110 Galway Circle
Chalfont, PA 18914-3900



☐ CORRECTED (if checked)

PAYER'S/TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Nevada College Savings Trust Fund The Vanguard 529 College Savings Plan PO Box 55111 Boston, MA 02205-5111 (866)734-4530		1 Gross distribution	OMB No. 1545-1760
		\$ 17,000.00	Form 1099-Q (Rev. November 2019)
		2 Earnings	For calendar year
		\$ 6,847.19	20 <u>22</u>
PAYER'S/TRUSTEE'S TIN 61-6487563	RECIPIENT'S TIN XXX-XX-5437	3 Basis	4 Trustee-to-trustee transfer <input type="checkbox"/>
		\$ 10,152.81	
RECIPIENT'S name Ramya Balaram		5 Distribution is from:	6 If this box is checked, the recipient is not the designated beneficiary <input checked="" type="checkbox"/>
Street address (including apt. no.) 110 Galway Circle		• Qualified tuition program— Private <input type="checkbox"/> or State <input checked="" type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code Chalfont, PA 18914		• Coverdell ESA <input type="checkbox"/>	
Account number (see instructions) 288621518-02		If the fair market value (FMV) is shown below, see Pub. 970 , Tax Benefits for Education, for how to figure earnings.	

**Payments From
Qualified
Education
Programs
(Under Sections
529 and 530)**

**Copy B
For Recipient**

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Form **1099-Q** (Rev. 11-2019) (keep for your records)

www.irs.gov/Form1099Q

Department of the Treasury - Internal Revenue Service

Instructions for Recipient

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Also, an additional 10% tax may apply to part or all of any amount included in income from the CESA or QTP. See Form 5329 and your tax return instructions for more information.

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Box 5. Shows whether the gross distribution was from a QTP (private or state) or from a CESA.

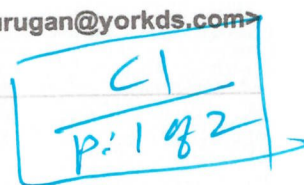
Box 6. The designated beneficiary is the individual named in the document creating the trust or custodial account to receive the benefit of the funds in the account. If you are not the designated beneficiary, see Pub. 970 and the Instructions for Forms 1040 and 1040-SR.

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Senthil Murugan <senthil.murugan@yorkds.com>

**Confirmation of Filing Annual Report**

1 message

no-reply@njportal.com <no-reply@njportal.com>

Sun, Apr 17, 2022 at 12:58 PM

To: senthil.murugan@yorkds.com

Thank you for using the Annual Reports and Change Services at NJ.gov. Your credit card or bank statement will show a charge from New Jersey Business Services. Please save or print this e-mail for your records.

Business Name: YORK DECISION SYSTEMS, LLC

NJ Entity Id: 0400226816

Confirmation Number: 1263683844

Filings: Annual Report for 2022

Amount: \$78.00

Transaction Date: 04/17/2022

Access Key: 81eae33e-5d71-4765-8010-ad87111ca599

Document Download: <https://www.njportal.com/DOR/AnnualReports/Document>

Documents Available Until: 07/16/2022

You may access the documents you requested by using the Document Download link or by entering the Access Key above in the Document Retrieval Center.

Requested documents are only available to download for 90 days from the transaction date.

[Get Annual Report Filing Reminders and CorpWatch Alerts](#)

Take our quick 1-2 minute [survey](#) to tell us what you think.

See what else you can do online at www.NJ.gov.

This electronic government service includes a service fee that allows the State of New Jersey to deliver this and other important services without tax funding. This fee is paid to a third party that provides these services for the State and thus is not considered revenue for the State of New Jersey.

NJ.gov - The official web site for the State of New Jersey



Senthil Murugan <senthil.murugan@yorkds.com>

CI
P: 282

New Jersey Government Services Payment Receipt

1 message

no-reply@njportal.com <no-reply@njportal.com>

Sun, Apr 17, 2022 at 12:58 PM

Payment Receipt Confirmation

Your payment was successfully processed.

Transaction Summary

Description	Amount
	\$78.00
Pay now with New Jersey Government Services	\$78.00

Please do not reply to this email. This email is sent from an account we use for sending messages only and we will not receive your reply. Thank you for using the Annual Reports and Change service at the NJ Division of Revenue and Enterprise Services.

Customer Information

Customer Name Senthil Murugan
Company Name
Local Reference ID 1263683844
Receipt Date 4/17/2022
Receipt Time 12:58:56 PM EDT

Payment Information

Payment Type Credit Card
Credit Card Type VISA
Credit Card Number *****1729
Order ID 165668728
Billing Name Senthil Murugan

Billing Information

Billing Address 110 Galway Circle
Billing City, State Chalfont, PA
ZIP/Postal Code 18914
Country US
Phone Number 215-716-1324
This receipt has been emailed to the address below.
Email Address senthil.murugan@yorkds.com



Senthil Murugan <senthil.murugan@yorkds.com>

C2
P: 181

Payment Receipt for Senthil Murugan

2 messages

RASI.COM <admin@rasi.com>

To: senthil.murugan@yorkds.com, receipts@rasi.com

Sun, Apr 17, 2022 at 12:35 PM



**REGISTERED AGENT
SOLUTIONS INC**
A LEXITAS COMPANY

**Registered Agent Solutions,
Inc.**

Corporate Headquarters
5301 Southwest Parkway
Suite 400
Austin, TX 78735

4/17/2022

Bill To:

Senthil Murugan
110 Galway Circle
Chalfont, PA 18914

To Our Valued Customer,

Thank you for choosing Registered Agent Solutions for your registered agent needs.

Invoice	Jurisdiction	Description	Amount
1384172	NJ	York Decision Systems LLC	\$175.00
Total Charges:			\$175.00
Amount Paid:			\$175.00
Payment Method:			Visa1729
Authorization Number:			599575

Please contact customer service at 888-705-7274 if you have any questions regarding this order. To register for Online Account Access please click on the following link www.rasi.com/registration.

Senthil Murugan <senthil.murugan@yorkds.com>

To: senthilmurugan@yahoo.com

Sun, Apr 17, 2022 at 12:37 PM

Copy of RASI registered agent payment receipt.

[Quoted text hidden]



Invoice

Invoice number: 4113008399

Bill to

Senthil Murugan
110 Galway Circle
Chalfont, PA 18914
United States

Details

Invoice number 4113008399
Invoice date Apr 30, 2022
Billing ID 9240-2015-8259
Domain name yorkds.com

Google Workspace

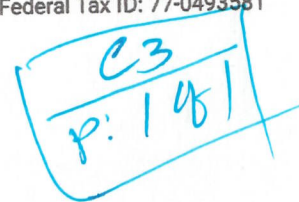
Total in USD

\$10.00

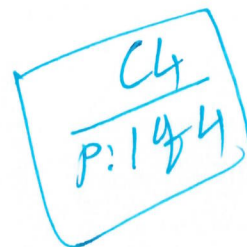
Summary for Apr 12, 2022 - Apr 17, 2022

Subtotal in USD	\$10.00
Tax (0%)	\$0.00
Total in USD	\$10.00

Google LLC
1600 Amphitheatre Pkwy
Mountain View, CA 94043
United States
Federal Tax ID: 77-0493581



You will be automatically charged for any amount due.



Payments profile ID
9240-2015-8259

Name
Senthil Murugan

Payments account nickname
Google for Work

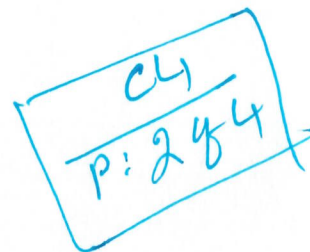
Summary created
Mar 19, 2023

Sep 1 – 30, 2022

Ending balance: \$3.18

Transaction Type	Description	Amount (USD)
Taxes	State sales tax	\$0.18
Costs	Google Workspace Business Starter: Usage of 1 seats	\$3.00
Payments	1 Payment	-\$1.55 ←

Starting balance: \$1.55



Payments profile ID
9240-2015-8259

Name
Senthil Murugan

Payments account nickname
Google for Work

Summary created
Mar 19, 2023

Oct 1 – 31, 2022

Ending balance: \$3.18

Transaction Type	Description	Amount (USD)
Taxes	State sales tax	\$0.18
Costs	Google Workspace Business Starter: Usage of 1 seats	\$3.00
Payments	1 Payment	-\$3.18 ←

Starting balance: \$3.18

Cy
P: 3 of 4



Payments profile ID
9240-2015-8259

Name
Senthil Murugan

Payments account nickname
Google for Work

Summary created
Mar 19, 2023

Nov 1 – 30, 2022

Ending balance: \$3.18

Transaction Type	Description	Amount (USD)
Taxes	State sales tax	\$0.18
Costs	Google Workspace Business Starter: Usage of 1 seats	\$3.00
Payments	1 Payment	-\$3.18 ←

Starting balance: \$3.18

C4
P: 484



Payments profile ID
9240-2015-8259

Name
Senthil Murugan

Payments account nickname
Google for Work

Summary created
Mar 19, 2023

Dec 1 – 31, 2022

Ending balance: \$3.18

Transaction Type	Description	Amount (USD)
Taxes	State sales tax	\$0.18
Costs	Google Workspace Business Starter: Usage of 1 seats	\$3.00
Payments	1 Payment	-\$3.18 ←

Starting balance: \$3.18



Investments: 1-855-880-2559
Bank Accounts: 1-877-247-2559

ET
P: 181

Money Market Savings Account Account

Money Market Savings

Account Number: *****0903

Routing Number: 124003116

Available Balance: \$131,284.04

Amount: -\$985.83

Posting Date: Apr 20, 2022

Posting Time: 11:18 PM ET

Type: Withdrawal

FRONT OF CHECK

SENTHIL MURUGAN 03-13 110 GALWAY CIRCLE CHALFONT, PA 18914		97-811/1240 1023
DATE <u>APR/17/2022</u>		
PAY TO THE ORDER OF <u>NICOLE PERCETTI, TAX COLLECTOR</u> \$ <u>985.83</u>		
<u>NINE HUNDRED AND EIGHTY FIVE AND 83/100</u> — DOLLARS		
Memo: <u>Parcel no: 26-007-500</u> <u>COUNTY TAX 2022</u>		
124003116: 2131220903 1023		

BACK OF CHECK

The security features listed below, as well as those not listed, exceed industry guidelines.

Security Features

- MP - all type in use applied to the front and back of the check.
- Microprint - all type in use applied to the front and back of the check.
- Watermark - all type in use applied to the front and back of the check.
- Security Thread - all type in use applied to the front and back of the check.
- Security Features - all type in use applied to the front and back of the check.

* FEDERAL RESERVE BOARD OF GOVERNORS REG.

DO NOT WRITE, STAMP OR SIGN BELOW THIS LINE.
RESERVED FOR FINANCIAL INSTITUTION USE *

NEW BRITAIN Township Tax Collector
100011279
For Deposit Only

A FEW THINGS YOU SHOULD KNOW



Investments: 1-855-880-2559
Bank Accounts: 1-877-247-2559

E2
P: 181

Money Market Savings Account Account

Money Market Savings

Account Number: *****0903

Routing Number: 124003116

Available Balance: \$131,284.04

Amount: -\$3,020.20

Posting Date: Jul 28, 2022

Posting Time: 11:16 PM ET

Type: Withdrawal

FRONT OF CHECK

SENTHIL MURUGAN 03-13 110 GALWAY CIRCLE CHALFONT, PA 18914		97-311/1240	1024
DATE <u>July/22/2022</u>			
PAY TO THE ORDER OF <u>CBSO</u>		\$ <u>3020.20</u>	
<u>THREE THOUSAND AND TWENTY AND 20/100</u> DOLLARS			
Memo: <u>Parcel no: 26-007-500</u> <u>School tax 2022-2023</u>		<u>[Signature]</u>	
MICR: ⑆ 124003116⑆ 2131220903⑆		1024	

BACK OF CHECK

The security features listed on the back of the check are as well as those listed on the back of the check.

Security Features:

- Microprint: Tiny dots forming the words "FEDERAL RESERVE NOTE"
- Watermark: A faint image of the Statue of Liberty
- Color Shifting Ink: The color of the ink changes as you view the check from different angles
- Security Thread: A thin, wavy thread embedded in the paper
- Ultraviolet Features: The check glows under ultraviolet light
- Tactile Features: Raised lines and dots for the visually impaired
- Serial Number: A unique number printed on the check
- Signature: A signature that matches the signature on the front of the check
- Address: The address of the payee
- Verification: A verification code printed on the back of the check

* FEDERAL RESERVE BOARD OF GOVERNORS REG-C-2

DO NOT WRITE, STAMP OR SIGN BELOW THIS LINE
RESERVED FOR FINANCIAL INSTITUTION USE *

ENDORSE HERE
FOR DEPOSIT ONLY
Central Bucks School District
4277743857

A FEW THINGS YOU SHOULD KNOW