

U.Plan Distribution Refund Form

U.Plan proceeds should be applied to the student's account to pay for undergraduate tuition and mandatory fees only. This form is used when the school is refunding all or a portion of the student's U.Plan payment to MEFA.

Student's Name: _____ **Social Security Number:** x x x - x x - _ _ _ _

Academic Year: _____

Refund Amount (as calculated below): \$ _____

Reason for Refund: _____

U.Plan Refund Calculation

Please refer to the U.Plan Distribution Roster for the applicable student as it provides information needed to calculate the refund amount. If the school credits only a portion of the U.Plan payment to the student's account, the school must prorate the refund amount. If you need an additional copy of your school's U.Plan Distribution Roster, please contact a U.Plan representative at 800-449-6332.

A	U.Plan Payment Amount: This amount is listed on the U. Plan Distribution Roster and does not include School Contribution.	\$
B	Portion of U.Plan Payment Amount applied to student's account for Tuition and Mandatory Fees*. This amount does not include School's Contribution Amount.	\$
C	Refund Amount** (A minus B)	\$

**Does not include Room and Board*

*** If less than \$300, mail to family. If greater than or equal to \$300, mail to MEFA.*

Completed by: _____

Date: _____

Title: _____

Phone Number: _____

Email Address: _____

Institution: _____

Please send a check payable to the U.Plan, along with this completed form to:

MEFA
 Attn: Claudia Niles
 U.Plan Records Administration
 60 State Street, Suite 900
 Boston, MA 02109

If you have any questions, please contact Claudia Niles at 617.224.4811 or cniles@mefa.org.