

- ▶ Use this form to refund all or a portion of the student's U.Plan payment to MEFA.

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

U.Plan Prepaid Tuition Program  
P.O. Box 44003  
Jacksonville, FL 32231-4306

- ▶ Complete a separate form for each student.

- ▶ If you have any questions, please contact Claudia Niles at [cniles@mefa.org](mailto:cniles@mefa.org) or **(617) 224-4811**.

### 1. STUDENT INFORMATION *(required)*

Student's Name

Social Security Number *(last four only)*

Academic Year

Refund Amount

Reason for Refund

### 2. U.PLAN REFUND CALCULATION

If a portion of the U.Plan payment is credited to the student's account, please complete the U.Plan Refund Calculation listed below. Please refer to the U.Plan Distribution Roster for the applicable student as it provides information needed to calculate the refund amount. If you need a copy of your school's U.Plan Distribution Roster, please contact Claudia Niles at [cniles@mefa.org](mailto:cniles@mefa.org) or **(617) 224-4811**.

A	<b>U.Plan Amount to Credit to Student Account:</b> This amount is listed on your U.Plan Distribution Roster and includes School Contribution.	\$
B	<b>Usage of U.Plan Amount to Credit to Student Account:</b> This is the actual U.Plan amount applied by the school to credit the student's account solely for tuition and mandatory fees*.	\$
C	<b>Usage Rate:</b> Determined by dividing (B) by (A) <b>(Usage Rate needs to display with six decimal positions.)</b>	
D	<b>U.Plan Payment Amount:</b> This amount is listed on your U.Plan Distribution Roster and does not include School Contribution.	\$
E	<b>Usage of U.Plan Payment Amount:</b> Determined by multiplying (C) and (D)	\$
F	<b>U.Plan Distribution Refund Amount:</b> Determined by subtracting (E) from (D)	\$

### 3. INSTITUTION INFORMATION

Completed By *(name)*

Title

Email Address

Phone Number

Institution

Date *(mm/dd/yyyy)*