

Name	Social Security Number
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**Part I Owners of the Edvest or Tomorrow's Scholar college savings account**

Section A – Allowable Subtraction

<u>1</u> Name of account beneficiary: Last _____ First _____		
<u>2</u> Amount you contributed to the account for 2020 .....	<b>2</b>	.00
<u>3</u> Enter \$3,340 (\$1,670 if married filing separate or a divorced parent) .....	<b>3</b>	.00
<u>4</u> Enter the smaller of line 2 or line 3 .....	<b>4</b>	.00
<u>5</u> Carryover (see instructions) .....	<b>5</b>	.00
<u>6</u> <b>Allowable subtraction.</b> Add lines 4 and 5 (see instructions for further limitations). Do not enter more than \$3,340 (\$1,670 if married filing separate or a divorced parent) .....	<b>6</b>	.00

Section B – Eligible Carryover

<u>7</u> Carryover to future years. Subtract line 6 from line 2. If line 6 is more than line 2, enter -0-. Also complete Part V .....	<b>7</b>	.00
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Section C – Total Amount Contributed to Account for 2014 – 2020

<u>8</u> Amount contributed to the account <b>by others</b> for 2020 .....	<b>8</b>	.00
<u>9</u> Amount contributed to the account for 2014 - 2019 (from line 10 of <b>2019</b> Schedule CS) .....	<b>9</b>	.00
<u>10</u> Add lines 2, 8, and 9. This is the total amount contributed to the account for 2014 – 2020 .....	<b>10</b>	.00

**Part II Persons other than the account owner**

Section A – Allowable Subtraction

<u>11</u> Name and address of account owner _____		
<u>12</u> Name of account beneficiary: Last _____ First _____		
<u>13</u> Amount you contributed to the account for 2020 .....	<b>13</b>	.00
<u>14</u> Enter \$3,340 (\$1,670 if married filing separate or a divorced parent) .....	<b>14</b>	.00
<u>15</u> Enter the smaller of line 13 or line 14 .....	<b>15</b>	.00
<u>16</u> Carryover (see instructions) .....	<b>16</b>	.00
<u>17</u> <b>Allowable subtraction.</b> Add lines 15 and 16 (see instructions for further limitations). Do not enter more than \$3,340 (\$1,670 if married filing separate or a divorced parent) .....	<b>17</b>	.00

Section B – Eligible Carryover

<u>18</u> Carryover to future years. Subtract line 17 from line 13. If line 17 is more than line 13, enter -0-. Also complete Part V .....	<b>18</b>	.00
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**Part III Withdrawals within 365 days of deposit**

<u>19</u> Using a first-in, first-out method, did you withdraw an amount in 2020 from an Edvest or Tomorrow's Scholar account within 365 days of a contribution to the account (see instructions)?		
<b>a</b> If yes, enter the amount deposited and withdrawn within 365 days .....	<b>19a</b>	.00
<b>b</b> Enter the portion of the amount withdrawn that was previously claimed as a subtraction from income. This amount must be included in income (see the instructions) .....	<b>19b</b>	.00
<b>c</b> Subtract line 19b from line 19a. This is the amount of carryover that must be reduced. Complete Part V .....	<b>19c</b>	.00

See instructions for completing form.



Name	Social Security Number
Account Beneficiary: Last name	First name

**Part IV Distributions from a college savings account rolled over or not used for qualified education expenses**

Section A – Distribution Not Used for Qualified Higher Education Expenses

**20** Who received the distribution check (*check one*):

- Account owner (Name of owner \_\_\_\_\_ )
- Account beneficiary (Name of beneficiary \_\_\_\_\_ )

<b>21</b> If the owner or beneficiary was subject to a federal penalty for 2020 because a distribution was not used for qualified higher education expenses, enter the amount of the distribution not used for qualified higher education expenses	<b>21</b>	.00
<b>22</b> Amount contributed to the account for 2014 – 2020 from line 10	<b>22</b>	.00
<b>23</b> Amount claimed as a subtraction for 2014 – 2020 by all contributors	<b>23</b>	.00
<b>24</b> Enter the smaller of line 21, 22, or 23. Add this amount to your (owner's) Wisconsin income	<b>24</b>	.00
<b>25</b> If line 21 is greater than line 24, subtract line 24 from line 21. Any carryover must be reduced by this amount. Complete Part V	<b>25</b>	.00

Section B – Rollover to another state's qualified tuition program (complete lines 26-28)

<b>26</b> If, during 2020, you rolled over an amount into another state's qualified tuition program, enter the amount rolled over	<b>26</b>	.00
<b>27</b> Enter the portion of the amount on line 26 that was previously claimed as a Wisconsin subtraction from income by yourself and other contributors to the account. This amount must be added to your Wisconsin income	<b>27</b>	.00
<b>28</b> Subtract line 27 from line 26. This is the amount of carryover that must be reduced. Complete Part V	<b>28</b>	.00

Section C – Rollover to a qualified ABLE account (complete lines 29-33)

<b>29</b> If, during 2020, you rolled over an amount into a qualified ABLE account, enter the amount rolled over	<b>29</b>	.00
<b>30</b> Exclusion amount	<b>30</b>	15000.00
<b>31</b> Subtract line 30 from line 29. If -0- or less, enter -0- and do not complete lines 32 and 33. You do not have to add an amount to Wisconsin income	<b>31</b>	.00
<b>32</b> Enter the portion of the amount on line 31 that was previously claimed as a Wisconsin subtraction from income by yourself and other contributors to the account. This amount must be added to your Wisconsin income ( <i>see instructions</i> )	<b>32</b>	.00
<b>33</b> Subtract line 32 from line 29. This is the amount of carryover that must be reduced. Complete Part V	<b>33</b>	.00

**Part V Computation of Carryover from 2020 to 2021**

<b>34</b> Carryover from line 39 of <b>2019</b> Schedule CS	<b>34</b>	.00
<b>35</b> Carryover from line 7 or line 18 of <b>2020</b> Schedule CS	<b>35</b>	.00
<b>36</b> Add amounts on lines 34 and 35	<b>36</b>	.00
<b>37</b> Enter the following amounts from this 2020 Schedule CS		
<b>a</b> lines 5 or 16 _____ <b>37a</b>	.00	
<b>b</b> line 19c _____ <b>37b</b>	.00	
<b>c</b> line 25 _____ <b>37c</b>	.00	
<b>d</b> line 28 _____ <b>37d</b>	.00	
<b>e</b> line 33 _____ <b>37e</b>	.00	
<b>38</b> Add the amounts on lines 37a through 37e	<b>38</b>	.00
<b>39</b> Subtract line 38 from line 36. This is your carryover to 2021	<b>39</b>	.00

