

## Michigan Education Trust (MET) Checklist

The checklist below is an aid for completing and submitting the documentation necessary to put your Michigan Education Trust (MET) contract to work for you. Expanded instructions are included in the pages that follow. Forms are accessible by clicking on the form number **Do not include the checklist with your submission.**

The MET Board of Directors has waived the deadline to submit a *Notice to Use MET Educational Benefits* (Form 3181) and a *Notice to Terminate a MET Educational Benefits Contract* (Form 2773). However, submit Form 3181 as soon as possible so that MET may notify the university/college of your funds in a timely manner. You must be 18 years old or have your high school diploma to submit Form 2773.

If your documentation to MET is incomplete or incorrect, MET will notify you in writing to request the necessary forms/changes. **Incomplete or incorrect documentation can delay notification to your intended institution.** If you need assistance with any of the forms, call MET toll free at (800) 638-4543, Monday through Friday, between 8 a.m. and 5 p.m., to speak with a MET operator.

Your MET Contract Confirmation sheet identifies your contract number(s) as:

88-999999 Full Benefits contracts contain either all numbers or 88-9P9999

88-L999999 Limited Benefits contracts contain the letter "L"

88-C999999 Community College Benefits contracts contain the letter "C."

Use the checklist below to determine the appropriate documentation to submit based on your situation. **IMPORTANT:** If a Federal W-9 is requested from the **REFUND DESIGNEE**, check your MET Contract Confirmation sheet or call the MET office toll free at (800) 638-4543 to determine the Refund Designee named by the Purchaser at the time of purchase. The Refund Designee will be the Beneficiary, Purchaser or Appointee.

### **Under a FULL and/or LIMITED Contract**

#### **Attending a Michigan Public 4-Year Institution**

- Notice to Use MET Educational Benefits* (Form 3181). Beneficiary must complete, sign and date.

#### **Attending a Michigan Community College**

### **Under a COMMUNITY COLLEGE Contract**

#### **Attending a Michigan Public 4-Year Institution**

- Notice to Terminate a MET Educational Benefits Contract* (Form 2773). Beneficiary must complete, sign and date.
- Copy of high school diploma, **if under 18 years of age.**
- Copy of acceptance letter from institution.

*Request for Taxpayer Identification Number and Certification* (Form W-9). **Refund Designee** must complete, sign and date regardless of whether the refund is directed to the institution or the Refund Designee. See “IMPORTANT” above.

#### **Attending a Michigan Public Community College**

*Notice to Use MET Educational Benefits* (Form 3181). Beneficiary must complete, sign and date.

#### **Under ALL Contracts**

#### **Attending a Michigan Independent or Out-of-State Institution**

*Notice to Terminate a MET Educational Benefits Contract* (Form 2773). Beneficiary must complete, sign and date.

Copy of high school diploma, *if under 18 years of age*.

Copy of acceptance letter from institution.

*Request for Taxpayer Identification Number and Certification* (Form W-9). **Refund Designee** must complete, sign and date regardless of whether the refund is directed to the institution or the Refund Designee.

#### **Attending under Full Tuition Scholarship, enrolled in a United States Military Academy or G.I. Bill**

*Notice to Terminate a MET Educational Benefits Contract* (Form 2773). Beneficiary must complete, sign and date.

Copy of scholarship verification showing amount of tuition covered and number of semester/years covered or renewal terms. Under Montgomery GI Bill proof of benefits or DD

FORM 2366. *Request for Taxpayer Identification Number and Certification* (Form W-9). Refund Designee must complete, sign and date.

#### **Not Attending a degree granting Higher Education Institution**

*Notice to Terminate a MET Educational Benefits Contract* (Form 2773). Beneficiary must complete, sign and date.

*Michigan Education Trust Affidavit* (Form 2773, ) Beneficiary must complete, sign and date. Signature must be notarized.

*Request for Taxpayer Identification Number and Certification* (Form W-9). Refund Designee must complete, sign and date.

#### **Military Enlistment**

*Notice to Terminate a MET Educational Benefits Contract* (Form 2773). Beneficiary must complete, sign and date.

Copy of enlistment contract.

*Request for Taxpayer Identification Number and Certification* (Form W-9). Refund Designee must complete, sign and date.

**Death/Disability of Beneficiary**

- Notice to Terminate a MET Educational Benefits Contract (Form 2773).*
- Copy of death certificate/letter confirming learning disability.
- Request for Taxpayer Identification Number and Certification (Form W-9).* Refund Designee must complete, sign and date.