

## HR 529

To amend the Internal Revenue Code of 1986 to improve 529 plans.

**Congress:** 114 (2015–2017, Ended)

**Chamber:** House

**Policy Area:** Taxation

**Introduced:** Jan 26, 2015

**Current Status:** Read twice and referred to the Committee on Finance.

**Latest Action:** Read twice and referred to the Committee on Finance. (Apr 16, 2015)

**Official Text:** <https://www.congress.gov/bill/114th-congress/house-bill/529>

## Sponsor

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**Name:** Rep. Jenkins, Lynn [R-KS-2]

**Party:** Republican • **State:** KS • **Chamber:** House

**Cosponsors** (38 total)

Cosponsor	Party / State	Role	Date Joined
Rep. Kind, Ron [D-WI-3]	D · WI		Jan 26, 2015
Rep. Gibson, Christopher P. [R-NY-19]	R · NY		Jan 27, 2015
Rep. Kelly, Mike [R-PA-3]	R · PA		Jan 27, 2015
Rep. Paulsen, Erik [R-MN-3]	R · MN		Jan 27, 2015
Rep. Cook, Paul [R-CA-8]	R · CA		Jan 28, 2015
Rep. Fitzpatrick, Michael G. [R-PA-8]	R · PA		Jan 28, 2015
Rep. Stutzman, Marlin A. [R-IN-3]	R · IN		Jan 28, 2015
Rep. Amodei, Mark E. [R-NV-2]	R · NV		Feb 2, 2015
Rep. Benishek, Dan [R-MI-1]	R · MI		Feb 2, 2015
Rep. Byrne, Bradley [R-AL-1]	R · AL		Feb 2, 2015
Rep. Huizenga, Bill [R-MI-2]	R · MI		Feb 2, 2015
Rep. Marchant, Kenny [R-TX-24]	R · TX		Feb 2, 2015
Rep. Poliquin, Bruce [R-ME-2]	R · ME		Feb 2, 2015
Rep. Goodlatte, Bob [R-VA-6]	R · VA		Feb 3, 2015
Rep. Graham, Gwen [D-FL-2]	D · FL		Feb 3, 2015
Rep. Hill, J. French [R-AR-2]	R · AR		Feb 3, 2015
Rep. Kline, John [R-MN-2]	R · MN		Feb 3, 2015
Rep. Meehan, Patrick [R-PA-7]	R · PA		Feb 3, 2015
Rep. Peters, Scott H. [D-CA-52]	D · CA		Feb 3, 2015
Rep. Westerman, Bruce [R-AR-4]	R · AR		Feb 3, 2015
Rep. Young, Todd [R-IN-9]	R · IN		Feb 3, 2015
Rep. Bera, Ami [D-CA-7]	D · CA		Feb 4, 2015
Rep. Forbes, J. Randy [R-VA-4]	R · VA		Feb 4, 2015
Rep. Heck, Joseph J. [R-NV-3]	R · NV		Feb 4, 2015
Rep. Kuster, Ann M. [D-NH-2]	D · NH		Feb 4, 2015
Rep. Nunes, Devin [R-CA-22]	R · CA		Feb 5, 2015
Rep. Poe, Ted [R-TX-2]	R · TX		Feb 5, 2015
Rep. Blum, Rod [R-IA-1]	R · IA		Feb 10, 2015
Rep. Connolly, Gerald E. [D-VA-11]	D · VA		Feb 10, 2015
Rep. Fincher, Stephen Lee [R-TN-8]	R · TN		Feb 10, 2015
Rep. Johnson, Sam [R-TX-3]	R · TX		Feb 10, 2015
Rep. Roskam, Peter J. [R-IL-6]	R · IL		Feb 10, 2015
Rep. Grothman, Glenn [R-WI-6]	R · WI		Feb 11, 2015
Rep. Himes, James A. [D-CT-4]	D · CT		Feb 11, 2015
Rep. Latta, Robert E. [R-OH-5]	R · OH		Feb 11, 2015
Rep. Sessions, Pete [R-TX-32]	R · TX		Feb 11, 2015
Rep. Thompson, Mike [D-CA-5]	D · CA		Feb 11, 2015
Rep. Smith, Jason [R-MO-8]	R · MO		Feb 13, 2015

## Committee Activity

Committee	Chamber	Activity	Date
Finance Committee	Senate	Referred To	Apr 16, 2015
Ways and Means Committee	House	Reported By	Feb 20, 2015

## Subjects & Policy Tags

### Policy Area:

Taxation

## Related Bills

Bill	Relationship	Last Action
114 S 335	Identical bill	May 21, 2015: Placed on Senate Legislative Calendar under General Orders. Calendar No. 97.
114 HRES 121	Related bill	Feb 25, 2015: Motion to reconsider laid on the table Agreed to without objection.

## Summary (as of Feb 25, 2015)

(This measure has not been amended since it was reported to the House on February 20, 2015. The summary of that version is repeated here.)

This bill makes changes to the rules for qualified tuition programs (known as 529 plans).

(Sec. 2) The Internal Revenue Code is amended to allow payments from 529 plans for the purchase of computer or peripheral equipment, computer software, or Internet access and related services to be used primarily by a 529 plan beneficiary while enrolled in an eligible educational institution.

(Sec. 3) The requirement that distributions from a 529 plan be aggregated for purposes of determining the amount includible in a taxpayer's income is eliminated.

(Sec. 4) Students who receive a refund from an eligible educational institution can recontribute such refund to a 529 plan without tax consequences if the recontribution is made not later than 60 days after the date of such refund and does not exceed the refunded amount.

## Actions Timeline

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- **Apr 16, 2015:** Read twice and referred to the Committee on Finance.
- **Feb 26, 2015:** Received in the Senate.
- **Feb 25, 2015:** Considered under the provisions of rule H. Res. 121. (consideration: CR H1135-1142)
- **Feb 25, 2015:** Rule provides for consideration of H.R. 529 and H.R. 5. Provides for one hour of debate, waives all points of order against consideration of the bills. Section 1 of the resolution provides that the amendment in the nature of a substitute printed in the bill shall be considered as adopted and the bill, as amended shall be considered read. The resolution provides one motion to recommit with or without instructions. Section 2 provides that no further consideration of H.R. 5 shall be in order except pursuant to a subsequent order of the House. Section 3 waives the requirement of clause 6(a) of rule XIII for a two-thirds vote to consider a report from the Committee on Rules on the same day it is presented to the House with respect to any resolution reported through the legislative day of March 2, 2015, relating to a measure making continuing appropriations for the Department of Homeland Security for the fiscal year ending September 30, 2015. Section 4 provides that it shall be in order at any time through the calendar day of March 1, 2015, for the Speaker to entertain motions that the House suspend the rules as though under clause 1 of rule XV, relating to a measure making or continuing appropriations for the Department of Homeland Security for the fiscal year ending September 30, 2015.
- **Feb 25, 2015:** DEBATE - The House proceeded with one hour of debate on H.R. 529.
- **Feb 25, 2015:** Mr. Lieu, Ted moved to recommit with instructions to the Committee on Ways and Means. (consideration: CR H1139-1141; text: CR H1139-1140)
- **Feb 25, 2015:** DEBATE - The House proceeded with 10 minutes of debate on the Ted Lieu motion to recommit with instructions pending a reservation of a point of order. The instructions contained in the motion seek to require the bill to be reported back to the House with an amendment adding new sections on parents' right to know cost of brokerage fees and impact on long-term savings and rates of return and low fees. Subsequently, the reservation was removed.
- **Feb 25, 2015:** The previous question on the motion to recommit with instructions was ordered without objection. (consideration: CR H1140)
- **Feb 25, 2015:** On motion to recommit with instructions Failed by the Yeas and Nays: 176 - 243 (Roll no. 89).
- **Feb 25, 2015:** Passed/agreed to in House: On passage Passed by recorded vote: 401 - 20 (Roll no. 90). (text: CR H1135-1136)
- **Feb 25, 2015:** On passage Passed by recorded vote: 401 - 20 (Roll no. 90). (text: CR H1135-1136)
- **Feb 25, 2015:** Motion to reconsider laid on the table Agreed to without objection.
- **Feb 24, 2015:** Rules Committee Resolution H. Res. 121 Reported to House. Rule provides for consideration of H.R. 529 and H.R. 5. Provides for one hour of debate, waives all points of order against consideration of the bills. Section 1 of the resolution provides that the amendment in the nature of a substitute printed in the bill shall be considered as adopted and the bill, as amended shall be considered read. The resolution provides one motion to recommit with or without instructions. Section 2 provides that no further consideration of H.R. 5 shall be in order except pursuant to a subsequent order of the House. Section 3 waives the requirement of clause 6(a) of rule XIII for a two-thirds vote to consider a report from the Committee on Rules on the same day it is presented to the House with respect to any resolution reported through the legislative day of March 2, 2015, relating to a measure making continuing appropriations for the Department of Homeland Security for the fiscal year
- **Feb 20, 2015:** Reported (Amended) by the Committee on Ways and Means. H. Rept. 114-25.
- **Feb 20, 2015:** Placed on the Union Calendar, Calendar No. 17.
- **Feb 12, 2015:** Committee Consideration and Mark-up Session Held.
- **Feb 12, 2015:** Ordered to be Reported (Amended) by Voice Vote.
- **Jan 26, 2015:** Introduced in House
- **Jan 26, 2015:** Referred to the House Committee on Ways and Means.