1) Create an account

BrightStart529
College Savings

Let's set up your account!

In order to fund your beneficiary's account, you will need to create a login. Opening an account takes about 10 minutes.

4 Easy Steps

- Verify your identity and tell us about yourself
- Tell us about who you are saving for

ACCOUNT BASICS

Already Started? Continue Enrollment

First Name

Last Name

Email

Confirm Email

Username

Password

Confirm Password

All fields are required unless indicated as optional.

Create Login

RENEST

2) Fill out basic information

ACCOUNT OWNER

Saved just now

Tell us about yourself

Please share your information so we can verify your identity

Phone Number

Phone Type

SSN or ITIN

Confirm SSN / ITIN

Date of Birth
MM/DD/YYYY

We are required by federal law to obtain, verify, and record information that identifies each person who opens an account.

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Save and Close

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RENEST

3) Fill out basic information

ACCOUNT OWNER

Saved just now

What is your address?

We'll need your address to verify your account.

Street Address

Street Address Line 2 (optional)

City

State
California

ZIP Code

I have a different mailing address

We are required by federal law to obtain, verify, and record information that identifies each person who opens an account.

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RENEST

4) Choose "Myself" as beneficiary

BENEFICIARY

Saved just now

Who are you saving for?

This person will be the beneficiary of the account. They'll get to use these funds to pay for educational costs.

What is your relationship to the beneficiary?

The child is not born yet

- My child
- My grandchild
- A niece/nephew
- Myself
- Someone else

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RENEST

Set up your initial contribution or select "Skip this step" to start with a recurring contribution (funded by bank or payroll) or open an account without a contribution.

Skip this step >

Funding Method

Funding Method
Bank

Routing Number

Bank Name

Account Type

Account Number

Confirm Account Number

Bank Account Holder

First Name

Last Name

Initial Contribution

Many savers start with money they've received as gifts for birthdays, baby showers, and graduations.

Contribution Amount
$1

Promo Code (optional)

Note: Any added promo code will be applied after account creation and will not be reflected in your review screen.

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5) Choose "Bank" for funding method and then scroll down and choose $1 or you can put how much you'll spend on rent this year

INVESTMENTS

How would you like to invest?

Choose between two strategies that best fits your timeline for saving for future education.

If the approach you select now doesn't fit your goals later, you can adjust your investment selections after your account is established.

Investment Strategy

6) Choose "Build your own"

- ( ) **Keep it simple**
  We identify an investment portfolio that aligns with your beneficiary's age and will automatically adjust over time without any extra work from you.
- (•) **Build your own**
  You select specific investment portfolios and then actively manage that mix of investments over time.

The information appearing on this page is not a recommendation or investment advice.

RENEST

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7) Choose “High Yield Bank Savings 529 Portfolio” option

Cash and Cash Equivalent Show all | Hide all

- [x] High Yield Bank Savings 529 Portfolio — Details
- [ ] Principal Plus Interest 529 Portfolio — Details

< Back | Save and Close | Set Allocations

INVESTMENTS

Saved just now

Allocate Portfolios

You must allocate at least 1% to each portfolio you select and all allocations must total 100%.

High Yield Bank Savings 529 Portfolio Remove	**8) Enter 100%**	100 %
Total Percentage Allocated		100 %

Please remember to revisit your portfolios often as these allocations are static. Existing investments may be exchanged up to twice per calendar year and allocations for future investments may be changed at any time.

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9) Make sure everything is entered correctly. Then select electronic delivery (unless you want mailed statements) and open account

DELIVERY METHOD OF DOCUMENTS

Quarterly Statements and Plan Description Updates	Transaction & Profile Confirmations	Tax Forms
Electronic Delivery	Electronic Delivery	Electronic Delivery

☑ By checking this box, I consent to receive the Plan Description electronically and I acknowledge having reviewed, printed, or otherwise received it. I also agree to receive documents related to my 529 account(s) by the delivery methods as set forth above. If I have chosen to receive documents electronically, I acknowledge that I have carefully read the terms and conditions regarding electronic delivery and I consent and agree to receive documents electronically as set forth above. You can update your delivery preferences any time online.

TERMS & CONDITIONS

☑ I acknowledge that I have carefully read, consent and agree to the Terms and Conditions set forth in the Plan Description and the Privacy Policy.

By clicking open account you are confirming the above information is complete and accurate to the best of your knowledge.

Save and Close | Open Account

RENEST