

# 1) Create an account



## Let's set up your account!

In order to fund your beneficiary's account, we 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
- ✓ Set up your initial and recurring savings
- ✓ Select how would you like to invest

[Important Legal Information](#) ▾

### ACCOUNT BASICS

*Already Started?* [Continue Enrollment](#)



All fields are required unless indicated as optional.

Create Login

## 2) Fill out basic information

ACCOUNT OWNER

### Tell us about yourself


Please share your information so we can verify your identity

<div>Phone Number</div>	<div>Phone Type</div>
<div>SSN or ITIN</div>	<div>Confirm SSN / ITIN</div>
<div>Date of Birth MM/DD/YYYY</div>	<div>Citizenship</div>

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

### 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.

## 4) Choose “Myself” as beneficiary

### BENEFICIARY

## 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

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

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Save and Close

Next

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

## 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



Guide me based on a date

Use an enrollment date to pick a portfolio that automatically rebalances as an enrollment date approaches.

### 6) Choose “Pick my own portfolio”



Pick my own portfolio

Pick a portfolio that best matches your timeframe and investment strategy.

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

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[Save and Close](#)

[Next](#)

# 7) Choose “US Treasury Money Market Port” option

## Fixed Portfolios

Show all | [Hide all](#)

Fixed Portfolios do not change allocation over time.

Fixed Portfolios offer specific asset classes that are composed of various mutual funds. With these portfolios, the asset allocations do not shift over time but that doesn't mean you don't have control or flexibility. You can move your assets to a more conservative or aggressive portfolio up to two times per year per beneficiary. Please note that all investments are subject to market risk, including the potential loss of principal.

- |   |                         |
|---|-------------------------|
| <input type="checkbox"/> Balanced Portfolio                       | <a href="#">Details</a> |
| <input type="checkbox"/> Bond and Income Portfolio                | <a href="#">Details</a> |
| <input type="checkbox"/> Equity Index 500 Portfolio               | <a href="#">Details</a> |
| <input type="checkbox"/> Equity Portfolio                         | <a href="#">Details</a> |
| <input type="checkbox"/> Extended Equity Mkt Index Port           | <a href="#">Details</a> |
| <input type="checkbox"/> Global Equity Mkt Index Port             | <a href="#">Details</a> |
| <input type="checkbox"/> Inflation Focused Bond Port              | <a href="#">Details</a> |
| <input type="checkbox"/> Social Index Equity Portfolio            | <a href="#">Details</a> |
| <input type="checkbox"/> US Bond Index Portfolio                  | <a href="#">Details</a> |
| <input checked="" type="checkbox"/> US Treasury Money Market Port | <a href="#">Details</a> |

INVESTMENTS

# Allocate Portfolios

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

US Treasury Money Market Port <a href="#">Remove</a>	8) Enter 100%	<input type="text" value="100 %"/>
Total Percentage Allocated		<input type="text" value="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.

## 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 Electronic Delivery	Transaction & Profile Confirmations Electronic Delivery	Tax Forms Electronic Delivery
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- ☒ 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](#)