1) Create an account

Have the following information ready for enrollment

What you need to complete enrollment

Information about you

Address, birth date, Social Security number*

Information about your beneficiary

Birth date, Social Security number*

Bank Information

The account number for your account, routing number for your bank (if you're going to have contributions taken from a checking or savings account)

Prepare your investment strategy

To learn more, see the Program Description.

*We are required by federal law to obtain, verify, and record information that identifies each person who opens an account. If you don't provide the requested information, we may not be able to open your account. If we are unable to verify your identity, the Plan reserves the right to close your account or take other steps we deem reasonable.

Close

Start Saving Today

If you are enrolling for yourself or on behalf of a future student, enter your information to get started.

Already started enrolling? Continue Enrollment

First Name: John
MI
Last Name: Smith

Phone Number: XXX-XXX-XXXX

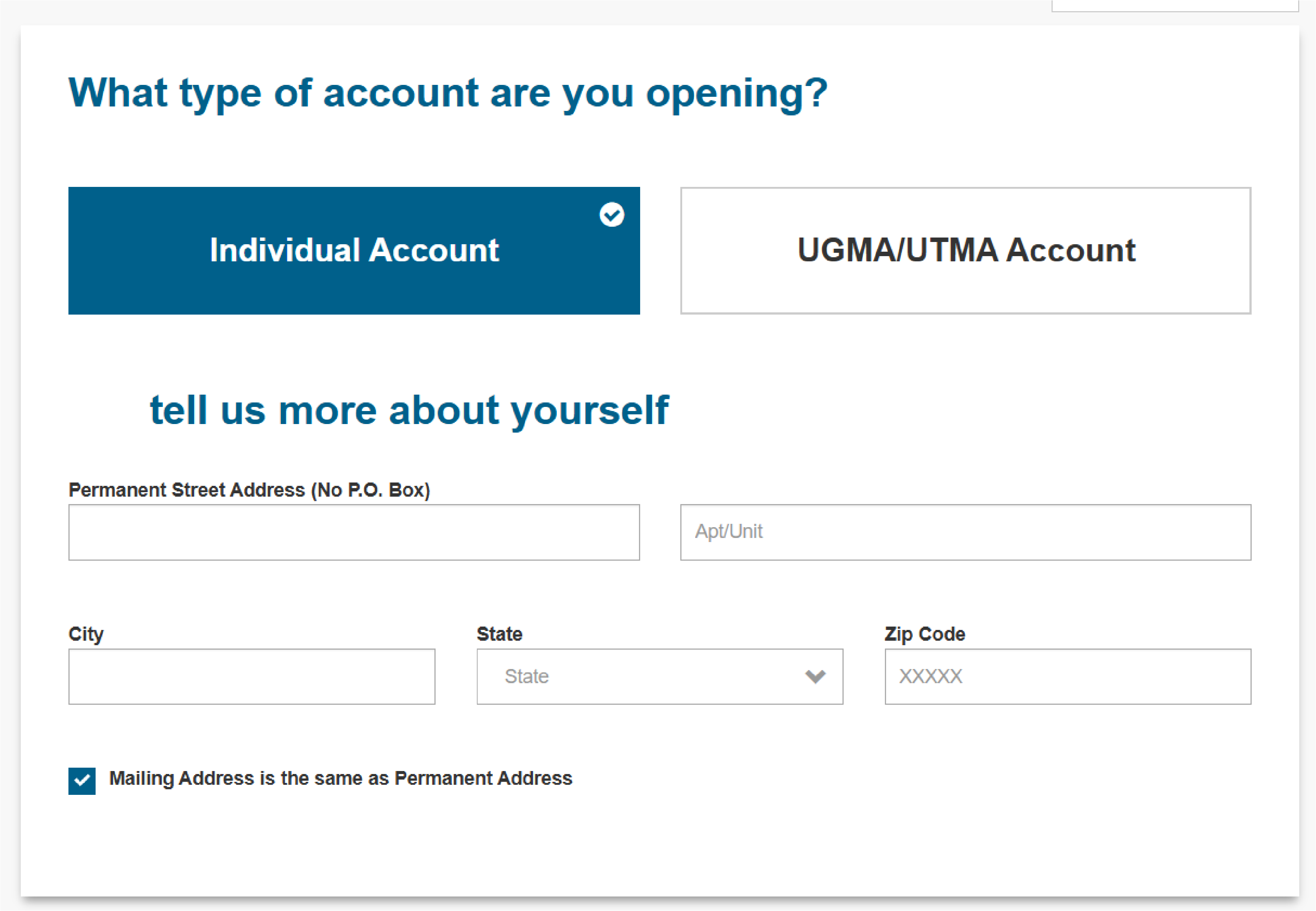
Email Address: john.smith@email.com

Password
Confirm Password

Get Started

RENEST

2) Select “Individual Account” and fill out basic information



3) Fill out basic information

Social Security/Tax Identification

XXX-XX-XXXX

Why is this information needed?

This information is secure

Birth Date

Month | Day | Year

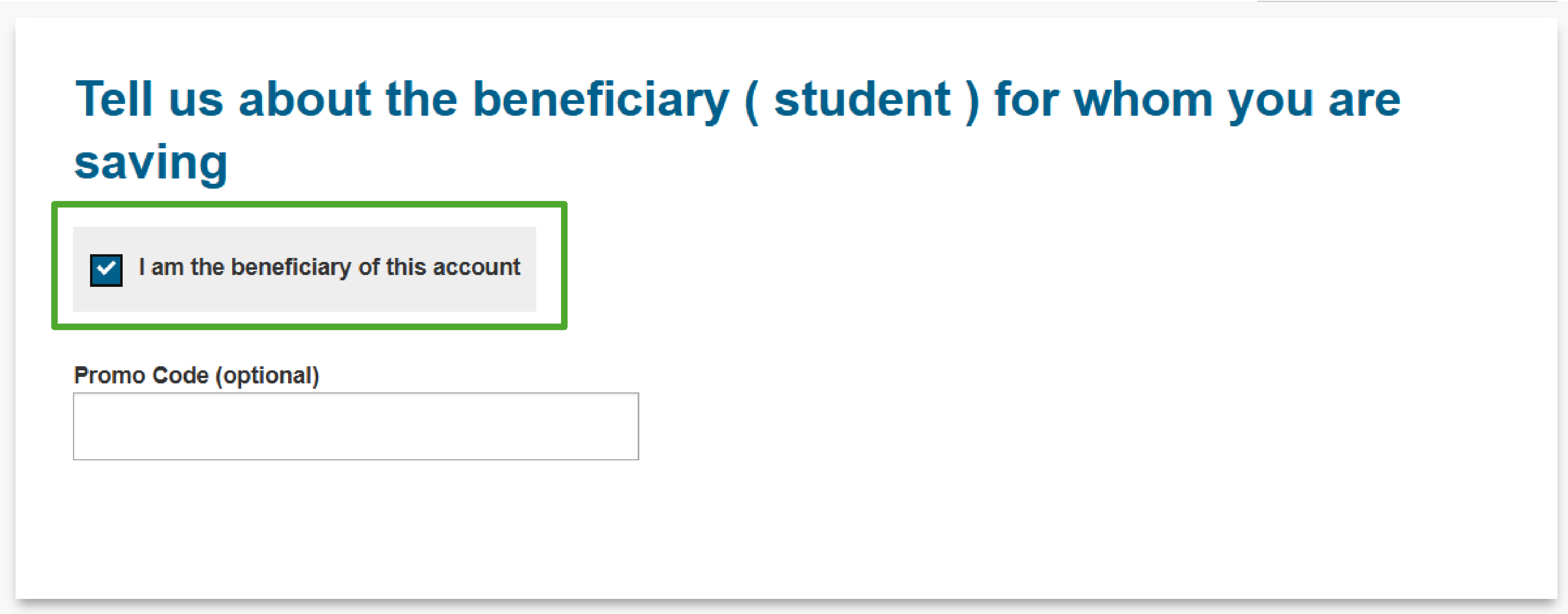
Citizenship

(please select)

Are you an employee of the State of Rhode Island or any Rhode Island local or municipal authority, or is your primary place of employment or business within the State of Rhode Island?

(Please Select)

4) Check the box “I am the beneficiary of this account”



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5) Add a successor or select "Skip This Section"

Adding a successor is not necessary to unlock your 529 benefits

Add a successor

Skip This Section

The successor takes over management of the account for the beneficiary, in the event of the account owners death.

First Name | **MI** | **Last Name**

Why is this information important?

Phone Number

XXX-XXX-XXXX

Birth Date

Month | Day | Year

6) Select "Customized"

Year of Enrollment
Put your investment on autopilot

Customized
Select from a mix of investment options

Custom Portfolio (Choose Investment Mix)

Choose the percentage you would like to allocate to each individual investment option below. Use whole numbers and the total must equal 100%.

Expand each section to view options within each portfolio type and click on ℹ for detailed information about each investment.

Age-Based Portfolios (Investments Based On Age)

Target Risk Portfolios (Investments Based On Risk Level)

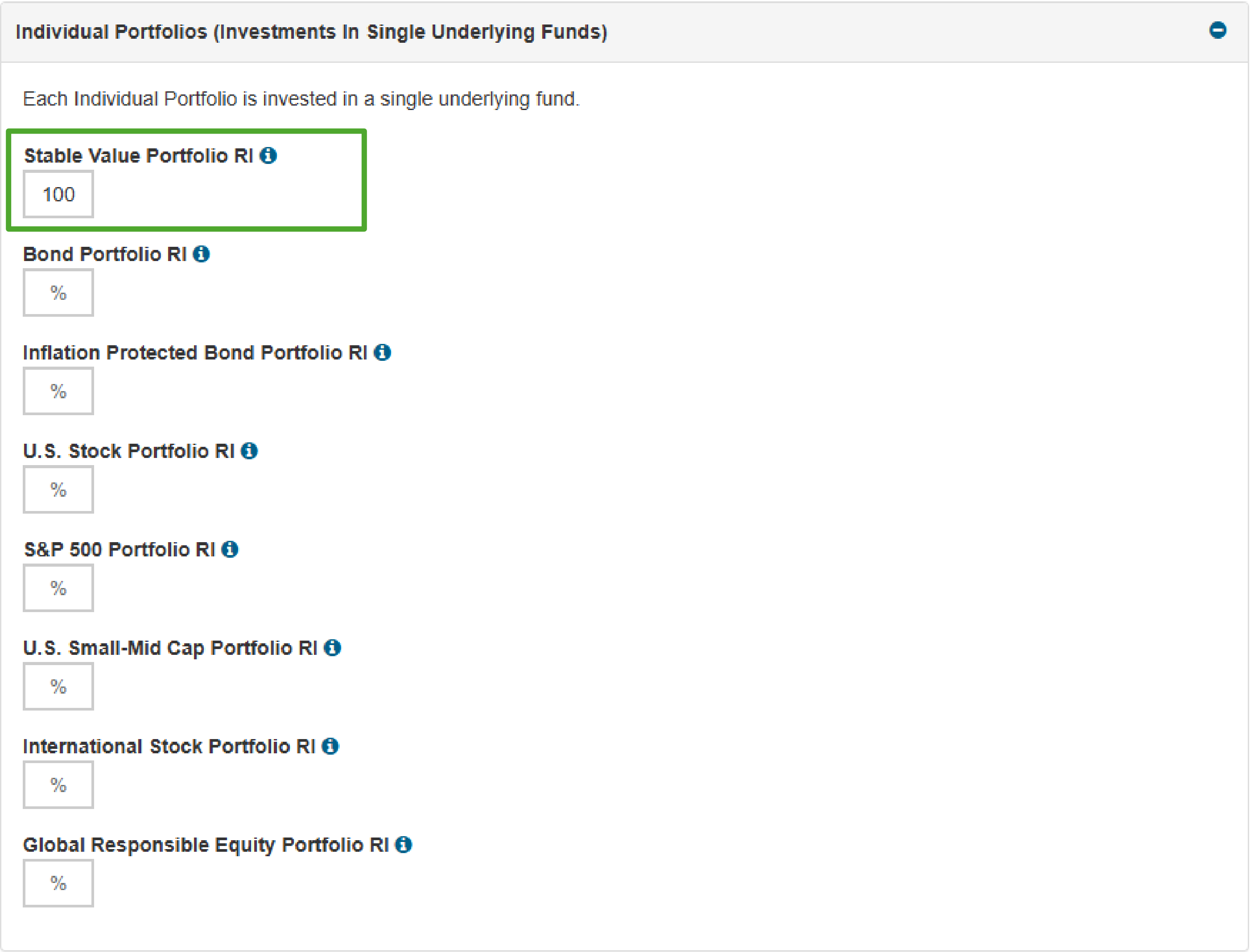
Individual Portfolios (Investments In Single Underlying Funds)

Total: 0%

Note: Account owners are permitted to change the investment selections up to two times per calendar year.

7) Open “Individual Portfolios” and scroll down

Enter 100% for “Stable Value Portfolio RI”



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Bank Account
One-time or recurring

Payroll Direct Deposit
Deductions from paycheck

Check
Mail in a paper check

Rollover
From an existing Qualified Tuition Program

Bank Account

You can setup a recurring contribution so funds are withdrawn on a regular basis or do a one-time contribution.

Initial Contribution Amount:

$0.00

Make contribution recurring (Automatic Funding)

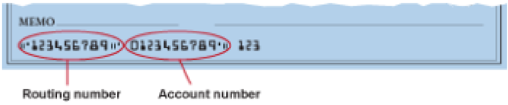
Enter bank information

Routing Number:

Bank Name:

Account Number:

Retype Account Number:



Account Type

(please select)

8) For funding, select "Bank Account" and choose $1 or you can put how much you'll spend on rent this year

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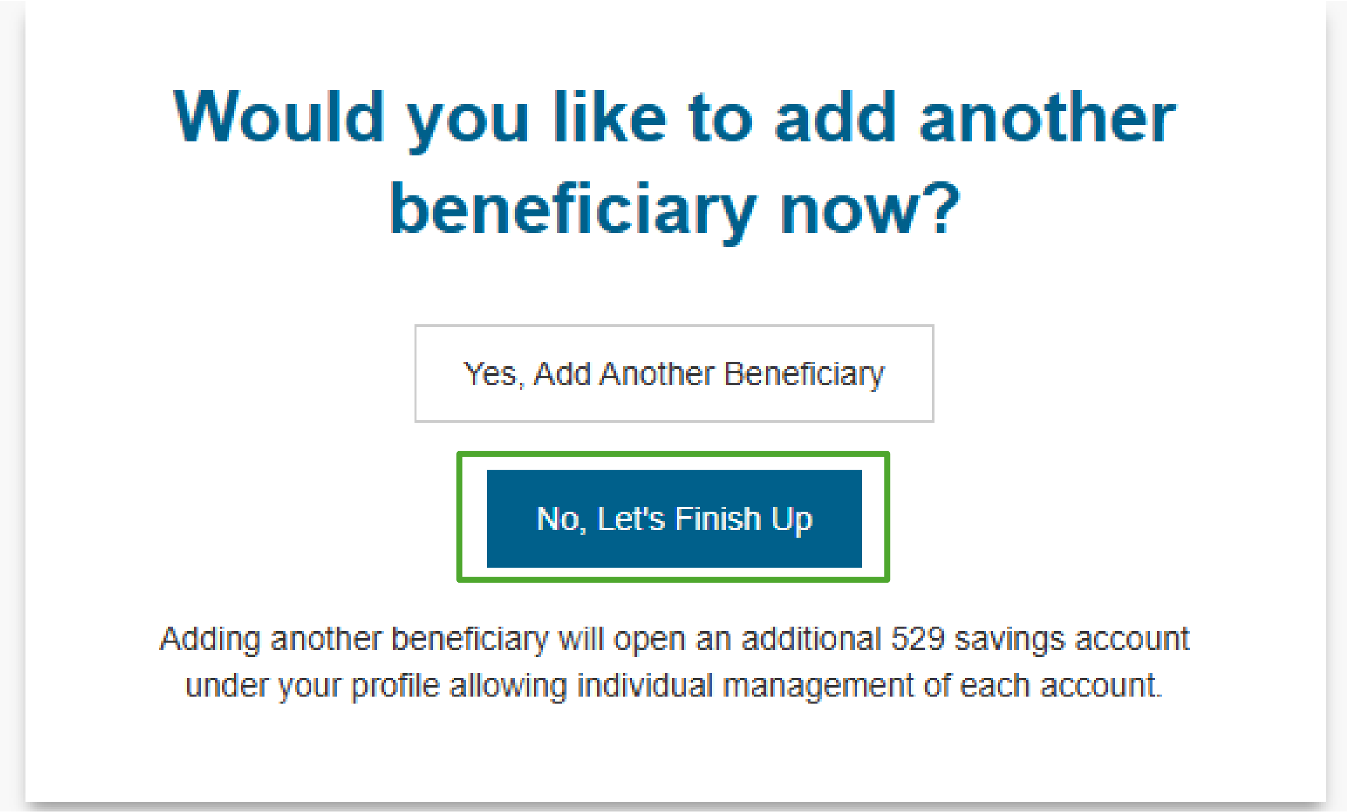
9) Add another beneficiary or select “No, Let’s Finish Up”

Adding another beneficiary is not necessary to unlock your 529 benefits



Add Account Username

Username

e.g. collegesaver1234

Trust this device

By trusting this device you will not have to enter additional security information when accessing your account for 6 months. It is not recommended to trust public devices.

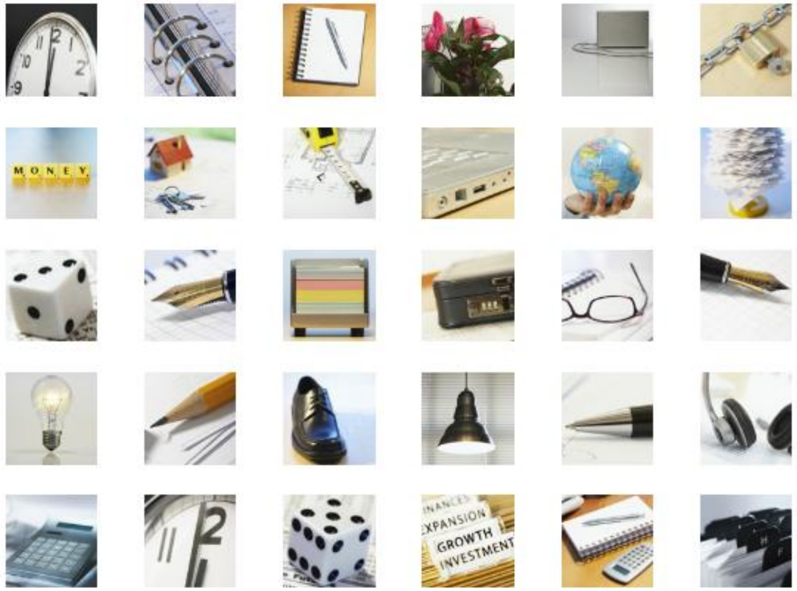
Select your security questions

Question 1	Security Answer 1
(please select)	

Question 2	Security Answer 2
(please select)	

Question 3	Security Answer 3
(please select)	

Choose Security Image and Phrase



Security Phrase

Tip: Only provide your login credentials if the security image and phrase you have provided are present on the login page.

10) Enter account login and security information

11) Continue past the Ugift page

Adding Ugift is not necessary to unlock your 529 benefits

Saving for college is easier with help from friends and family

☐ Activate Ugift Code

Sharing a Ugift code allows friends and family to gift money to your 529 Account.

Learn more about Ugift

Go Back

Continue

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12) Select email delivery (unless you want mailed statements)

How would you like to receive communications from us?

Transaction & Profile Confirmations

Email

Tax Forms

Email

Quarterly Statements and Program Description Updates

Email

Note: Requisite tax forms intended for the beneficiary will be mailed to the beneficiary's address on record regardless of the delivery option selected above.

IMPORTANT INFORMATION REGARDING ELECTRONIC DELIVERY

The terms below apply to your election to receive electronically one or more of the following types/categories of documents related to your 529 account(s): tax reporting forms, account statements and Program Description updates, and transaction confirmations. If you don't elect electronic delivery, we will send you paper documents.

- [x] I 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 information regarding electronic delivery and I consent and agree to receive documents electronically as set forth above.

13) Make sure everything is entered correctly and then sign to open an account

Terms & Conditions

Consent to Electronic Delivery of the Initial Offering Documents and Terms and Conditions

To open an account in CollegeBound Saver using an e-signature, you must consent (by clicking "sign" below) to receive the initial disclosure documents electronically. If you do not click "sign", you may not open your account using an e-signature. You consent and agree:

To receive the following document electronically and acknowledge having reviewed, printed, or otherwise received it:

- Program Description

☑ **By electronically signing below, I hereby acknowledge that I have received, read and agree to the terms and conditions of the Program Description which governs all aspects of this Account and is incorporated herein by reference. I will retain a copy for my records.**

Sign

RENEST