1) Enroll online

CollegeCounts Alabama's 529 Fund

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Open an Account

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Get started today

Tax advantages, account flexibility, and quality investment options are some of the benefits offered by the CollegeCounts 529 Fund. Setting up an account with CollegeCounts is easy.

- Enroll Online – Take a few minutes to open an account from your computer.
- Download an Enrollment Form – Print and complete the Enrollment Form; then mail it to CollegeCounts to open your college savings account.
- Download a Rollover Form – Move your college savings from another 529 plan or a Coverdell Education Savings Account into the CollegeCounts 529 Fund and start taking advantage of the great college savings benefits this plan has to offer!
- Download an Enrollment Kit – Download the complete kit including a CollegeCounts Color Booklet, Program Disclosure Statement, Enrollment Form, and Rollover Form.
- Request an Enrollment Kit – Order an Enrollment Kit to be mailed to you.

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2) Review electronic consent forms and proceed

Electronic Consent

Home / Electronic Consent

By completing the online enrollment process, you are consenting to conduct business electronically. Therefore, you must be able to review and retain any disclosure materials such as the Program Disclosure Statement and Financial Privacy Policy in an electronic format. **Before your consent will be effective, you must click on the links below to open these documents. Here is the current version of each:**

- Program Disclosure Statement
- Financial Privacy Policy

You have the option to obtain the disclosure documents in paper form by calling us at (866)529-2228.

This consent applies to your entire relationship with the CollegeCounts 529 Fund.

You have the right to withdraw your consent to conduct business electronically by contacting us at (866)529-2228.

If you do not consent to conduct business electronically, you will need to submit a paper enrollment form.

I have read the Program Disclosure Statement * — **Yes**

I have read the Financial Privacy Policy * — **Yes**

Captcha — I'm not a robot (reCAPTCHA, Privacy - Terms)

I CONSENT

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3) Fill out login and security information

Web User Profile

Enter the information below to set up your online account access.

*** Required fields are marked by asterisk**

- User ID must be 6-12 characters
- Password will use 12 to 20 characters. Must have at least 1 upper case letter, 1 lower case letter, 1 number, and 1 special character.
  Special characters include: $ @ ! % * # ? &

Enter Web User Info

Or login using existing credentials.

Enter User Name*

Enter User Name

Enter Password*

Enter Password

Re-enter Password*

Re-enter Password

Phone*

United States (+1) (__) ___-___

Email*

Email

Re-enter Email*

Re-enter Email

Enter User Nickname

Enter User Nickname

Select the Security Questions and Answers

Security Question 1*

Security Question 1

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4) Select “Individual” for Account Type

New Account Setup

1 **Account Type**

If the Account Owner is a custodian under a State UTMA or UGMA, a tax-exempt organization, or a Trust - please complete and mail a paper Enrollment Form to CollegeCounts.

SELECT ACCOUNT TYPE BELOW

Select Account Type

Individual

Important information about procedures for opening a new account:

To help the government fight the funding of terrorism and money laundering activities, federal law requires financial institutions to obtain, verify and record information that identifies each person who opens an account. This means that when you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may ask to see your driver's license or other identifying documents. If you do not provide this information when requested, the Program Manager may be delayed or unable to open your account and accept your investment.

Cancel Back Save and Continue

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5) Fill out personal information

New Account Setup

2 **Account Owner**

This individual owns and controls the account.

*** Required fields are marked by asterisk**

Account Owner Information

SSN*

___-__-____

Re-enter SSN*

___-__-____

First Name*

First Name

Middle Initial

Middle Initial

Last Name*

Last Name

Date of Birth*

MM/DD/YYYY

Gender

N/A

Cancel | Back | Save and Continue

6) Fill out personal information (cont'd)

New Account Setup

3 **Address**

Enter new address including phone number and email address. (P.O. Boxes are not accepted)*.

*** Required fields are marked by asterisk**

Address Information

Registration Address

Country*

United States

Address*

Address

Apt/Ste/Floor

Apt/Ste/Floor

Zip/Postal Code*

Zip/Postal Code

City*

City

State/Province*

Select...

Phone

United States (+1) (212) 111-2222

Alt Phone

United States (+1) (__) ___-____

Email

hohayo1386@bnsteps.com

+ Alternate Mailing Address

+ Temporary Address

Cancel Back Save and Continue

7) Enter information for a successor

New Account Setup

4

Successor Account Owner

We encourage you to name a Successor Account Owner who will become the Account Owner in the event the current Account Owner dies or becomes legally incompetent.

*** Required fields are marked by asterisk**

Primary Successor

Successor Type*

Select...

Legal First and Last Name*

Legal First and Last Name

Percent Assigned*

0.00%

Successor SSN*

Successor SSN

Verify Successor SSN*

Verify Successor SSN

Date of Birth*

MM/DD/YYYY

Successor Address

☐ Same as Account Owner Address

Country*

United States

Address*

Address

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8) Enter your personal information as the beneficiary

New Account Setup

5 **Beneficiary**

The Beneficiary is the individual whose qualified education expenses will be paid from the Account.

*** Required fields are marked by asterisk**

Beneficiary Information

SSN*

___-__-____

Re-enter SSN*

___-__-____

First Name*

First Name

Middle Name

Middle Name

Last Name*

Last Name

Date of Birth*

MM/DD/YYYY

Relationship*

Select...

Select "Self" for Relationship

Gender

N/A

Address Information

☐ Same as Account Owner Address

Country*

United States

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9) Enter bank information for where you want to contribute from

New Account Setup

6

Bank Account Details

Please provide the following information to link your bank account to your CollegeCounts Account.

*** Required fields are marked by asterisk**

Routing Number*

Routing Number

Bank Name*

Bank Name

Bank Account Number*

Bank Account Number

Re-enter Bank Account Number*

Re-enter Bank Account Number

Account Owner(s) Name*

Account Owner(s) Name

Account Type*

Savings Checking

Bank Nickname

Bank Nickname

Verify

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10) Under Select Funds, choose "Bank Savings 529 Portfolio"

Open An Account

7 **Investment Options**

Choose any combination of the Age-Based, Target, and/or Individual Fund Portfolios

*** Required fields are marked by asterisk**

Investment Election

Investment Option*

All Investments

Select Funds

Fund Name*	Investment Election*	Action
Bank Savings 529 Portfolio	100%	
Total	100%	

Enter 100% for Investment Election

+ Add Fund

Investors in the CollegeCounts 529 Fund do not own shares of the underlying funds directly, but rather own shares of a Portfolio in the ACES Trust Fund. Each investment option is described in more detail in the CollegeCounts 529 Fund Program Disclosure Statement.

Investment Products: Not FDIC Insured, No Bank Guarantee, May Lose Value.

Cancel Back Save and Continue

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11) Select “Electronic Bank Transfer” for Contributing

Open An Account

8 **Contributing**

Select how you would like to contribute to your Account (select all that apply).

*** Required fields are marked by asterisk**

If you would like to do a **Rollover** or setup **Payroll Deduction**, please download the forms **here**.

☐ Electronic Bank Transfer

Initial Funding using Electronic Bank Transfer will not be available since a verified bank account is unavailable. To add a verified bank from Bank Info step select 'Verify by logging into your bank account' verification method.

☐ Check

Investments

All investments will be considered as current year contribution.

Investment Name	Investment Election
Bank Savings 529 Portfolio	100%
Total	**100%**

If you are doing an Electronic Bank Transfer, you must enter the amount you'd like to contribute and then select the bank by clicking on the bank box above to proceed.

Cancel Back Skip Save and Continue

12) Select E-Delivery (unless you want mailed statements)

Open An Account

10 **E-Delivery**

Setup preferred delivery mode for Statements, Confirms, Tax Forms, etc to the Investor.

Recipient Type - Account Holder

Email

Address

Type of Document	Delivery Mode
Statements	E-delivery
Confirms	E-delivery
Tax Forms	E-delivery

Consent Agreement for Electronic Delivery

BY CHECKING THE BOX BELOW AND CLICKING ON "SAVE AND CONTINUE" YOU AGREE TO THE FOLLOWING TERMS:

13) Make sure everything is entered correctly; then hit submit to create an account

10 E-Delivery

Edit

Document Type	Delivery Mode
Statements	E-delivery
Confirms	E-delivery
Tax Forms	E-delivery

If the information above is correct click the Save and Continue button.

Cancel Back Save and Continue

Modification and Termination

I agree that Union Bank may modify or terminate this Agreement without notice at any time. Any modification or termination of this Agreement will be posted by Union Bank on the Plan website.

I agree that Union Bank may immediately terminate access to my account if I breach this Agreement.

Electronic Signature

By clicking the "I Agree" box below, I acknowledge that I have read, understand, and agree to meet all the terms and conditions above. I agree that I am providing the legal equivalent of my handwritten signature and agree to print or save a copy of this Agreement for my own records. This Agreement is effective as of today's date, and is binding on myself, any successor account owner, and any trust or person on whose behalf I have entered into this agreement.

- [x] I Agree. By clicking on this box you agree to all of the above Terms and Conditions

Cancel Back Submit

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