

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 [Plan 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

RENEST

Start Saving Today

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

Existing Account Owner? To enroll another account [Login](#)

Already started enrolling? [Continue Enrollment](#)

First Name

John

MI

Last Name

Smith

Phone Number

XXX-XXX-XXXX

Phone Type

Please Select



Email Address

john.smith@email.com


Password

Confirm Password

Get Started

2) Select “Individual Account” and enter basic information

What type of account are you opening?

Individual Account 

UGMA/UTMA Account

tell us more about yourself

Permanent Street Address (No P.O. Box)

Apt/Unit

City


State

State 

Zip Code

XXXXX

☒ Mailing Address is the same as Permanent Address


 Go Back

 Save


Continue


3) Fill out basic information (cont'd)


Social Security Number


Why is this information needed? 

Birth Date


Month 


Day 


Year 

 This information is secure

Gender

Please Select 

 Go Back

 Save

Continue

4) Check the box "I am the beneficiary of this account"

Tell us about the beneficiary (student) for whom you are saving

☐ I am the beneficiary of this account

First Name

MI

Last Name

☒ Mailing Address is the same as the account owner

Social Security Number

Birth Date

Month



Day



Year



Gender

Please Select



Relationship of Account Owner to Beneficiary

(please select)



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

Adding a successor is not necessary to unlock your 529 benefits

Add a successor

This person will direct the account in the untimely event of your death.

First Name

MI

Last Name

Why is this information important?

+

Phone Number

Birth Date

Month

▼

Day

▼

Year

▼

Go Back

Save

Continue

6) Select “Custom Portfolio”

Choose an investment strategy

Enrollment Year Investment Portfolios

Select a portfolio based on the year you expect your beneficiary to attend school

Custom Portfolio

Select your own mix of investments

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

Custom Portfolio (Choose Investment Mix)

You must allocate at least 1% to an individual investment to total 100%. Expand the desired portfolio types to view options and click on ⓘ for information about each investment.

Enrollment Year Investment Portfolios



Static Investment Portfolios



Principal Plus Interest Investment Portfolio



Total: 0%

7) Open “Principal Plus Interest Investment Portfolio”


Enter 100% for “Principal Plus Interest Investment Portfolio”

Principal Plus Interest Investment Portfolio

Principal Plus Interest Portfolio ⓘ

100

Principal Plus Interest Portfolio



Total: 100%

Go Back

Save

Continue

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 (minimum of \$25/month) or do a one-time contribution.

Initial Contribution Amount:

minimum \$25 initial contribution; maximum \$190,000 one-time EFT contribution

☐ Make contribution recurring (Automatic Funding)

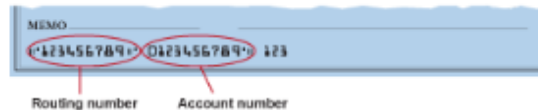
Enter bank information

Routing Number:

Bank Name:

Account Number:

Retype Account Number:



8) For funding, select “Bank Account” and choose \$25 or you can put how much you’ll spend on rent this year

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

Adding another beneficiary is not necessary to unlock your 529 benefits



Would you like to add another beneficiary now?

Yes, Add Another Beneficiary

No, Let's Finish Up

Adding another beneficiary will open an additional 529 savings account under your profile allowing individual management of each account.

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](#)

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 Plan 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.

Electronic Delivery Terms of Use

Notification- You will receive an e-mail notice each time a new updated document is available for viewing online, which will include a link taking you directly to the Plan's website. You may always access the documents online by going to www.path2college529.com.

Internet Slowdown - Your ability to view, download, and print the documents depends on Internet access to the Plan's website, and there is a risk that a system outage or slowdown could, from time to time, cause a document to become temporarily unavailable.

Hardware/Software - You will need an Internet connection, a valid e-mail account, a computer and operating system capable of receiving, accessing, displaying, and storing the documents you receive in Portable Document Format (PDF) and

☒ I acknowledge that I have carefully read and consent and agree to the terms set forth in the Path2College 529 Plan Plan Description.

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

Terms & Conditions

By signing below, I am agreeing to terms and conditions set forth below and in the *Participation Agreement for Accounts Owned by Individuals* (the "Participation Agreement") contained in the *Plan Description*. I understand and agree that those documents govern all aspects of this Account and are herein incorporated by reference.

I hereby establish, as the Account Owner, an Account representing an interest in the Path2College 529 Plan (the "Plan") for the Beneficiary to be named on this page and enter into this Participation Agreement (this "Agreement") relating to the Account with the Plan. The Board of Directors of the Georgia Higher Education Savings Plan is the Plan Administrator. I understand that the Plan Administrator has retained TIAA-CREF Tuition Financing, Inc. as the Plan Manager (the "Plan Manager") for the Plan and that this Agreement is subject to and incorporates by reference the information concerning the Plan, and the terms applicable to my Account, contained in the Plan Description and its Appendix (the "Plan Description"), as modified from time to time. Each capitalized term used, but not defined in this Agreement, has the meaning of the term provided in the Plan Description.

☒ **I acknowledge that I have carefully read and consent and agree to the terms set forth in the Path2College 529 Plan [Plan Description](#).**

Sign