

# 1) Create an account



## Registration Type

Never opened a my529 account? Select **I am new to my529** to create a new account with my529. Already have an account or sent forms and just want online access? Select **I have accounts with my529** to setup your online access.

Select Registration Type

I am new to my529

If you are an adult (age 18+), register below to begin opening an Individual account. This is the most common my529 account type that people open.

First Name

Last Name

Email

Username

Password



Confirm Password



[TERMS AND CONDITIONS](#)

I agree to the terms and conditions

CREATE

## 2) Fill out basic information



Add Account

1 Account Owner      2 Beneficiary      3 Investment      4 Review      5 Terms & Conditions      6 Confirmation

### Account Owner i

First Name

Middle Name

Last Name

Birth Date



Social Security Number / TIN

Confirm Social Security Number / TIN

Home Phone

MAILING

PHYSICAL

Street Address 1

Street Address 2

City

State

Postal Code

I am a Utah tax payer

CONTINUE

### 3) Choose “Self” as for Relationship to Account Owner

1      2      3      4      5      6

Account Owner      Beneficiary      Investment      Review      Terms & Conditions      Confirmation

#### Beneficiary i

Relationship to Account Owner

First Name

Middle Name

Last Name

Birth Date

Social Security Number / TIN

Confirm Social Security Number / TIN

MAILING PHYSICAL

Mailing address is same as Account Owner

Street Address 1

Street Address 2

City

State

Postal Code

Utah taxpayer/resident

BACK CONTINUE

## 4) Choose “FDIC-Insured” option

### Static Options

In the Static options, money remains in the same investment allocation without changing over time. The target allocation remains the same until you decide to change to a different investment option.

It is a good idea to review your static option periodically, especially if your investment objective changes over time.

The Internal Revenue Service allows you to make two option changes in a calendar year without triggering tax consequences.

[Review performance returns for static options.](#)

- Total US Stock Market (i) DETAILS
- Global Equity 90/10 US & International (i) DETAILS
- Global Equity 70/30 US & International (i) DETAILS
- 80/20 Aggressive (i) DETAILS
- 60/40 Balanced (i) DETAILS
- 40/60 Moderate (i) DETAILS
- 20/80 Conservative (i) DETAILS
- Fixed Income (i) DETAILS
- FDIC-Insured (i) DETAILS
- Stable Value (i) DETAILS

# 5) Make sure everything is entered correctly



## Review

Please validate your information is correct before creating your account.

my529 will attempt to verify your identity using an identity verification company. In the event that my529 needs more information to verify your ID, we will contact you.

Promotional Code (optional)

### Investment Option

FDIC-Insured

Account Owner

Beneficiary

## 6) Read Terms and Conditions and open account when ready

7. I hereby authorize my529 to debit a scheduled contribution from my checking or savings account. This authorization is to remain in full effect until the above end date (if applicable) or until the following: (1) I delete the bank account(s) specified above or (2) I notify my529 of the revocation of this authorization by doing one of the following: (i) logging into Account Access at my529.org and use the online account feature Manage Contributions; (ii) contacting my529 by telephone at 800.418.2551; or (iii) submitting Form 200 via fax to 800.214.2956 or via U.S. Mail to PO Box 145100, Salt Lake City, UT 84114-5100. I understand that any revocation will not be effective until my529 has had a reasonable opportunity to act on the termination notification. If the bank account is owned jointly, I certify that I am authorized to initiate this transaction. I understand that rejected transactions or insufficient funds could cause fees to be assessed by my529 and/or my financial institution. (Applicable if I have signed up for online contribution(s).)
8. I understand that my account notification preferences have been set to online delivery. These settings can be changed at any time in my online login on the Settings page.

I have read, understand, and agree to the Terms and Conditions of my529 Account Agreement. By  clicking "I Agree" below where indicated, I hereby confirm my intent to enter into a contract with my529 to establish an account. I have read, understand, and retained a copy of the [Program Description](#) and will retain a copy of this document for my records.

BACK

I AGREE