1) Open an account

Have the following information ready for enrollment

LearningQuest 529 Education Savings Program

Getting **Started**

Setting up your Learning Quest Account, the Kansas 529 Plan

Please have this information ready before you start...

About you: Address, birth date, Social Security number*. If you are opening a joint account, you will also need address, birth date and Social Security number of the joint owner*.

About your successor *(Optional but recommended — Name a Successor Account Owner who will assume ownership of the Account in the event of incapacity or death of all account owners):* Birth date, mailing address, Social Security number and phone number*.

About your beneficiary *(The person whose Qualified Education Expenses will be paid for with the Account assets):* Birth date, Social Security number*, mailing address if different than the account owner.

About your investments *(how your contributions will be invested):* To learn more, see the Learning Quest Handbook.

About your bank *(if you're going to have contributions taken from a checking or savings account):* Your bank account number and bank's routing number.

If you are opening an account in the name of a trust or business or using proceeds from a Coverdell Education Savings Account, use this form.

*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 and return any contributions or take other steps we deem reasonable.

Before completing the application, be sure to read the Learning Quest Handbook.

To open a saved enrollment, click here.

New Account Owners

To open a new account, fill in the information below and click **continue.**

First Name

Last Name

Email

Primary Telephone

Promo Code (optional)

continue

Existing Account Owners

To open additional accounts, sign in then select "Open a New 529 Account". To make it easier we'll prefill your information on the new application.

User Name

I Forgot My User Name

I Forgot My Password

Sign up for online access

continue

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2) Enter basic information

Select "Individual Account" for Your New Account Type

Adding a successor account owner is not necessary to unlock your 529 benefits

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Steps

1 About You
2 About Your Beneficiary
3 Choose Investments
4 Pick a Funding Method
5 Select a Delivery Option
6 Complete Your Account

tips

Who can be an account owner?

You can open an account if you:

- Are a U.S. citizen or legal resident alien
- Have a Social Security number or Tax ID number (required by federal law)
- Provide a street address. You can use a P.O. Box for the mailing address.

If you are opening an account in the name of a trust or business or using proceeds from a Coverdell Education Savings Account to open an account where a minor is the account owner, download an enrollment form or request an enrollment kit to be sent to you.

Questions? We can help. Call us at 1-800-579-2203.

Your New Account Type

◉ **Individual Account**
An Account established by one adult who owns and controls assets intended to be used for the Qualified Education Expenses of a Designated Beneficiary.

○ **Joint Tenant Account**
An Account established by more than one adult who owns and controls assets intended to be used for the Qualified Education Expenses of a Designated Beneficiary. Joint accounts will be established as joint tenants with rights of survivorship and not as tenants in common. The first Account Owner's name and Social Security number will be used for IRS reporting purposes.

○ **K.I.D.S. Contribution Individual Account - for qualified Kansas residents only**
A contribution account for the K.I.D.S. Matching Grant program. One adult owns the Account.
An individual account will be created at the end of the process. Your K.I.D.S. Contribution account along with a Matching Grant account will be created after the review process. You will be notified once those accounts have been established. Until then the application will be pending. Click here to learn more about the K.I.D.S. Program.

○ **K.I.D.S. Contribution Account (Joint Owner) - for qualified Kansas residents only**
A contribution account for the K.I.D.S. Matching Grant program. Two adults own the Account.
A Joint Tenant account will be created at the end of the process. Your K.I.D.S. Contribution account along with a Matching Grant account will be created after the review process. You will be notified once those accounts have been established. Until then the application will be pending. Click here to learn more about the K.I.D.S. Program.

○ **UGMA/UTMA Account***
An Account funded with assets held in an UGMA/UTMA custodial account for the benefit of the Designated Beneficiary indicated on this Account Application. The custodian will be treated as the owner of the Account and has the duty to transact on behalf of the minor until the custodianship terminates under the terms of the Act under which it was established. The Designated Beneficiary, who is the minor, cannot be changed.

*Registration type is not available in the K.I.D.S. Matching Grant Program. For more information, please contact a Learning Quest Specialist at 1-800-579-2203.

About You (Account Owner)

First name | MI | Last name

US Permanent address (No P.O. Box)

City | State -- | Zip -

☐ Check if your mailing address is the same as your permanent address

Mailing address

City | State -- | Zip -

Telephone (The best number to reach you) - -

Email address | Retype email address

Social Security or Tax Identification number - - | Birth date MM DD YYYY

Citizenship
◉ U.S. Citizen ○ Resident Alien Please Select Country ○ Nonresident Alien

3) Enter your personal information for beneficiary (student)

Steps

1 About You
2 About Your Beneficiary
3 Choose Investments
4 Pick a Funding Method
5 Select a Delivery Option
6 Complete Your Account

tips

The beneficiary is the individual for whom you're saving.

There is no age limit.

You can be your own beneficiary. For example, you can save for your own higher education expenses.

You can change your Beneficiary at any time to another eligible family member of the Beneficiary*.

Please note that the beneficiary cannot be changed on a KIDS account or on a UGMA/UTMA Account.

Questions? We can help. Call us at 1-800-579-2203.

About Your Beneficiary (Student)

First Name | MI | Last Name

☐ Check if the beneficiary address is the same as the account owner address

Mailing address

City | State -- | Zip -

Social Security or Tax Identification number - -

Birth date MM DD YYYY

Citizenship

◉ U.S. Citizen ○ Resident Alien Please Select Country ○ Nonresident Alien

back | save | next

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4) Scroll down and select "Cash and Cash Equivalents Portfolio"

Age-Based Options

The portfolios shown below are based on the beneficiary's age. As the beneficiary gets older, your assets will move to a progressively more conservative portfolio within the track you select.

Index Track: 10% Equity Index Portfolio	%
Aggressive Track: 20% Equity Portfolio	%
Moderate Track: 10% Equity Portfolio	%
Conservative Track: Short-Term Portfolio	%

Static Portfolio Options

The assets will remain in the portfolio(s) you select until you choose a new Investment option.

100% Equity Portfolio	%
90% Equity Portfolio	%
70% Equity Portfolio	%
60% Equity Portfolio	%
50% Equity Portfolio	%
30% Equity Portfolio	%
20% Equity Portfolio	%
Short-Term Portfolio	%
Total Growth Index Portfolio	%
500 Index Portfolio	%
Balanced Index Portfolio	%
Total Bond Market Index Portfolio	%
Cash and Cash Equivalents Portfolio	100 %
TOTAL	100 %

back save next

Enter 100% for "Cash and Cash Equivalents Portfolio"

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5) Select “From my bank account – single one-time contribution”

For amount, enter $1 or you can enter how much you spend on rent in a year. Enter bank information for where you want to contribute from.

Steps

1 About You
2 About Your Beneficiary
3 Choose Investments
4 **Pick a Funding Method**
5 Select a Delivery Option
6 Complete Your Account

tips

Put your contributions on autopilot. Sign up for a Recurring Contribution because even small investments can make a big difference. You can also set up an annual Recurring Contribution increase to boost your savings.

(A plan of regular investment cannot assure a profit or protect against a loss in a declining market.)

Pick a Funding Method

How do you want to fund your 529 account?

○ **From my bank account - Recurring Contribution**
You can set up a Recurring Contribution so contributions are made on a regular basis.

◉ **From my bank account - single one-time contribution**
This will be a one-time transfer from your bank via Electronic Funds Transfer (EFT).

Amount (maximum $501,000.00 one-time EFT contribution)
$

For Electronic Funds Transfer (EFT), your financial institution must be a member of the Automated Clearing House (ACH). For security purposes, you will not be able to direct withdrawals to this bank account for the next 7 calendar days. Contributions made by EFT will not be available for withdrawal for 5 business days.

☐ **By adding this account, I acknowledge that my bank or financial institution is located in the U.S. and/or adheres to U.S. banking regulations.**

At least one of the Account Owners must be listed on the bank account registration to establish bank instructions for investments and withdrawals. If you'd like to enable 529 account contributions with a bank account owned by someone other than the Learning Quest account owner(s), you and the bank account owner(s) must complete an Account Features Form.

Routing number (9 digits)

Account number (17 digits or less) Retype Account number

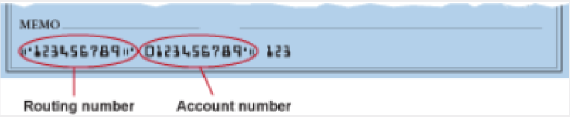
Bank name

Account type
(Choose)

Names on the Bank Account

First name MI Last name

First name MI Last Name



Note: Your bank's routing number and account number may appear in a different order on your check.

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6) Select "Notify by email" (unless you want mailed statements)

Quarterly Statements and Learning Quest Handbook Updates

- (•) Notify by email for all online statements/updates
- ( ) Notify by email for online statements/updates; mail year-end statement
- ( ) Mail all statements/updates

Transaction & Profile Confirmations

- (•) Notify by email
- ( ) Mail confirmations

Tax Forms

- (•) Notify by email
- ( ) Mail tax forms

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 E-COMMUNICATION

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 forms, account statements and Learning Quest Handbook updates, and transaction confirmations. If you don't elect e-communication, we will send you paper documents.

How is the consent to e-communication applied and how long does it last?
Your consent applies to all documents required for all Learning Quest accounts registered under your Social Security or taxpayer identification number, including custodial accounts established under the Uniform Gifts to Minors Act or the Uniform Transfers to Minors Act. Your consent will be effective until you revoke it or the plan revokes it. Upon revocation, it may take several weeks before you start receiving information via U.S. mail.

How will I know when documents are available online?
You'll receive an email notice whenever a new document is available online.

- Transaction and maintenance confirmations on your account are generally available online on the next business day following the trading or account activity.
- Account statements are available online approximately 5 days after the end of each statement period.
- To view any document online, go to learningquest.com and log in. Once in your account, click on "Profile and Documents" and then "Statements, Confirms and Tax Forms".

How are documents retained?
You can download and/or print any documents or request a free paper copy of any document by phone.

[x] **I/We agree to receive documents related to my/our 529 account(s) by the delivery methods as set forth above. If I/we have chosen to receive documents electronically, I/we acknowledge that I/we have carefully read the terms and information regarding electronic delivery and I/we consent and agree to receive documents electronically as set forth above.**

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7) Enter account login and security information

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

tips

For your online account safety, we recommend you choose a strong password!

Username must be between 6 and 25 letters or numbers, no special characters are allowed.

Your password must be at least 8 characters long and contain at least 3 of the 4 following criteria: upper case, lower case, numeric, or special characters such as !, @, #, $, % etc. Password cannot contain your username, first name and/or last name.

All three security questions must be answered. Security answers must be at least 2 characters.

Create User Name and Password

You will be able to use this user name and password to access your account.

User Name (Must be 6-25 characters)

Password (Your password must be at least 8 characters long and contain at least 3 of the 4 following criteria: upper case, lower case, numeric, or special characters such as !, @, #, $, % etc.)

Retype Password

Security Questions

If you forget your password, you will be asked to answer one of these questions to reset your password. Please enter a unique answer for each of the 3 security questions. The answers must be alphanumeric and at least 2 characters long.

Question: Select a question
Answer
Retype answer

Question: Select a question
Answer
Retype answer

Question: Select a question
Answer
Retype answer

Choose Security Image

Your security image consists of an image and personalized image name that is shared between you and Learning Quest. Your security image will be displayed after you enter your user name every time you log in. You should never enter your password without verifying your security image.

Choose an image by clicking on one of the images below, and then enter your personalized, easy-to-recognize name which will display under your image each time you log in.

Image Name

Trusted Devices

Should we require a PIN when you log in with this device?

- No. This is a "trusted device."
- Yes. Please require extra security with this device.

continue

Consent to Electronic Delivery of Initial Disclosure Documents

To open an account in Learning Quest using an e-signature, you must consent (by checking the box below) to receive the initial disclosure documents electronically. If you do not consent, you may not open your account using an e-signature. You consent and agree:

To receive the following documents electronically and acknowledge having reviewed, printed, or otherwise received them:

- Learning Quest Handbook
- Privacy Policy

Please be aware of the following:

- To view and print the documents online, you'll need Adobe Acrobat Reader, version 5.0 or higher. If you don't have Acrobat Reader, go to www.adobe.com, where you can download it for free.
- If you're unable to download, view, and print the documents, or you do not consent to electronic delivery, you cannot submit your application using an e-signature. Contact us at 1-800-579-2203 for assistance or to request a paper copy of any of these documents.
- The Plan does not charge you a fee to use our Web site, but you could incur expenses from your Internet service provider when you access information online. Also, be aware that your Internet service provider may occasionally experience system failure, and hyperlinks to documents may not function properly.

This election and consent applies only to the documents listed above.

Printer Friendly Version

☑ I(We) acknowledge that I(we) have carefully read and consent and agree to the terms set forth in the Learning Quest Handbook.

sign

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