

# 1) Create an account



## Let's set up your account!

In order to fund your beneficiary's account, we will need to create a login. Opening an account takes about 10 minutes.

### 4 Easy Steps

- Verify your identity and tell us about yourself
- Tell us about who you are saving for
- Set up your initial and recurring savings
- Select how would you like to invest

[Important Legal Information ▾](#)

ACCOUNT BASICS [Already Started? Continue Enrollment](#)

First Name

Last Name

Email  ✉

Confirm Email  ✉

Username

Password  👁

Confirm Password  👁

All fields are required unless indicated as optional.

[Create Login](#)

## 2) Fill out basic information

ACCOUNT OWNER

### Tell us about yourself

Please share your information so we can verify your identity

Phone Number

*Please let us know your phone number*

Phone Type

SSN or ITIN



Confirm SSN / ITIN



Date of Birth  
MM/DD/YYYY

Citizenship

We are required by federal law to obtain, verify, and record information that identifies each person who opens an account.

### 3) Fill out basic information (cont'd)

#### ACCOUNT OWNER

## What is your address?

We'll need your address to verify your account.

 Street Address Street Address Line 2 (optional) City State ZIP Code

I have a different mailing address

We are required by federal law to obtain, verify, and record information that identifies each person who opens an account.

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## 4) Choose “Myself” as beneficiary

### BENEFICIARY

#### Who are you saving for?

This person will be the beneficiary of the account. They'll get to use these funds to pay for educational costs.

What is your relationship to the beneficiary?

The child is not born yet

My child

My grandchild

A niece/nephew

Myself

Someone else

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## Funding Method

Funding Method  
Bank

Routing Number

Bank Name

Account Type

Account Number

Confirm Account Number

### Bank Account Holder

First Name

Last Name

#### This is a joint account

Please allow 3 business days for the funds to be withdrawn.

For electronic funds transfer, your financial institution must be a member of the Automated Clearing House (ACH). For security purposes, you will not be able to direct redemptions to this bank account for the next 15 calendar days. Contributions made by EFT will not be available for withdrawal for 7 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 and that I am authorized to transact on this account.

### Initial Contribution

Many savers start with money they've received as gifts for birthdays, baby showers, and graduations.

Contribution Amount  
\$25

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**5) Choose “Bank” for funding method and then scroll down and choose \$25 or you can put how much you’ll spend on rent this year**

## How would you like to invest?

Choose between two strategies that best fit your timeline for saving for future education.

If the approach you select now doesn't fit your goals later, you can adjust your investment selections after your account is established.

### Investment Strategy



#### Keep it simple

We identify a portfolio that aligns with your beneficiary's age and will automatically adjust over time without any extra work from you.

## 6) Choose “Build your own”



#### Build your own

You select specific portfolios and then actively manage that mix of investments over time.

The information appearing on this page is not a recommendation or investment advice.

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## 7) Choose “Principal Protected Portfolio” option

### Principal Protected Portfolio

Show all | Hide all

This portfolio focuses on protecting the principal you invest by allocating your contributions and earnings to a Funding Agreement issued by Ameritas Life Insurance Corp. to the District of Columbia Section 529 Plan Trust. The current Funding Agreement provides interest credited daily at a minimum annual effective rate of interest of 1%, and provides the opportunity for additional interest. The principal and the stated interest rate are insured by the contract provided by Ameritas Life Insurance Corp1.



Principal Protected Portfolio

Details

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Set Allocations

## Allocate Portfolios

You must allocate at least 1% to each portfolio you select and all allocations must total 100%.

Principal Protected Portfolio

[Remove](#)

**8) Enter 100%**

100 %

Total Percentage Allocated

100 %

Please remember to revisit your portfolios often as these allocation percentages are static. Existing investments may be exchanged up to twice per calendar year and allocations for future investments may be changed at any time.

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***You may be prompted to add another beneficiary; you can skip this step as it is not necessary to add another beneficiary to unlock your 529 benefits***

## 9) Make sure everything is entered correctly. Then select electronic delivery (unless you want mailed statements) and open account

### DELIVERY METHOD OF DOCUMENTS

Quarterly Statements and Plan Disclosure Document Updates Electronic Delivery	Transaction & Profile Confirmations Electronic Delivery	Tax Forms Electronic Delivery
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By checking this box, I consent to receive the Plan Disclosure Document electronically and I acknowledge having reviewed, printed, or otherwise received it. I also 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 conditions regarding electronic delivery and I consent and agree to receive documents electronically as set forth above. You can update your delivery preferences any time online.

### TERMS & CONDITIONS

I acknowledge that I have carefully read, consent and agree to the [Terms and Conditions](#) set forth in the [Plan Disclosure Document](#) and the [Privacy Policy](#).

By clicking open account you are confirming the above information is complete and accurate to the best of your knowledge.

[Save and Close](#)

[Open Account](#)