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

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

RENEST

2) Select "Individual Account"

What type of account are you opening?

Individual Account

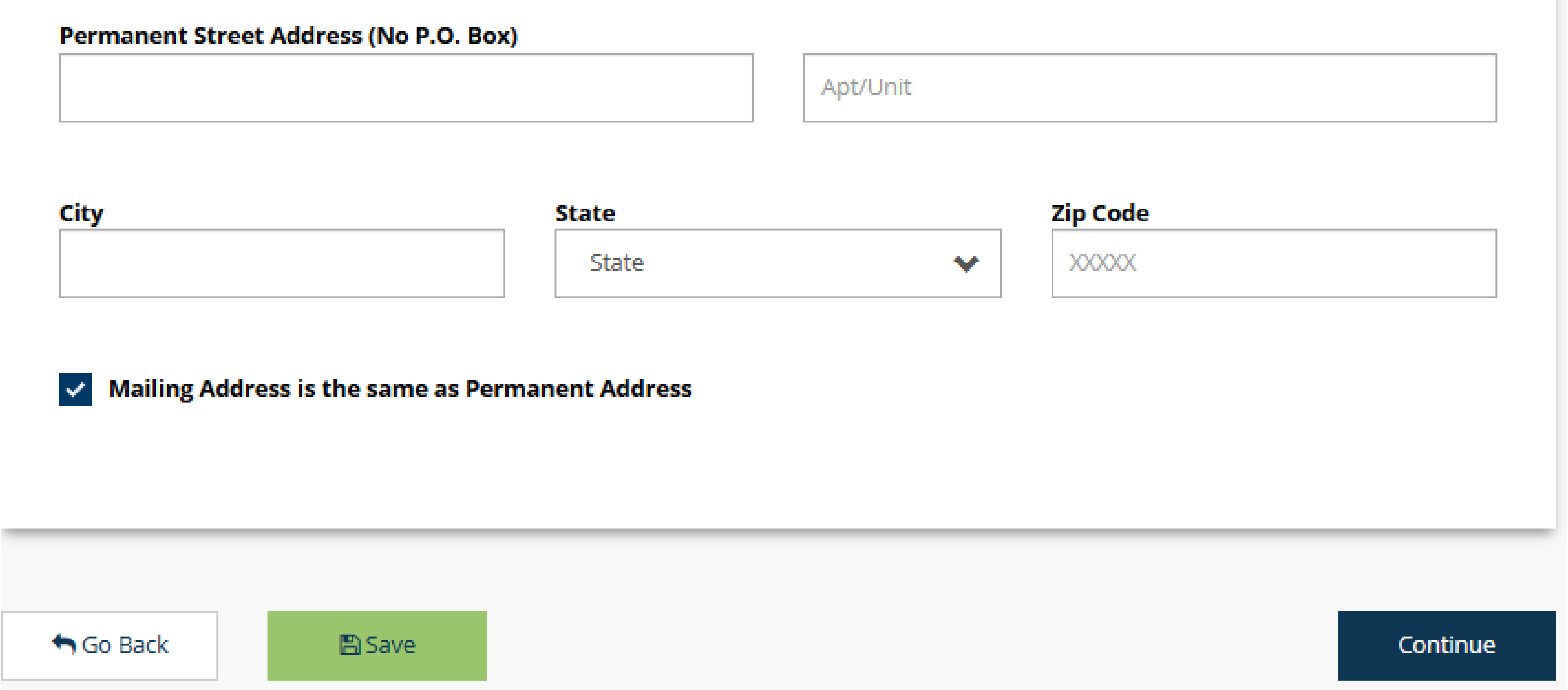
UGMA/UTMA Account

Go Back

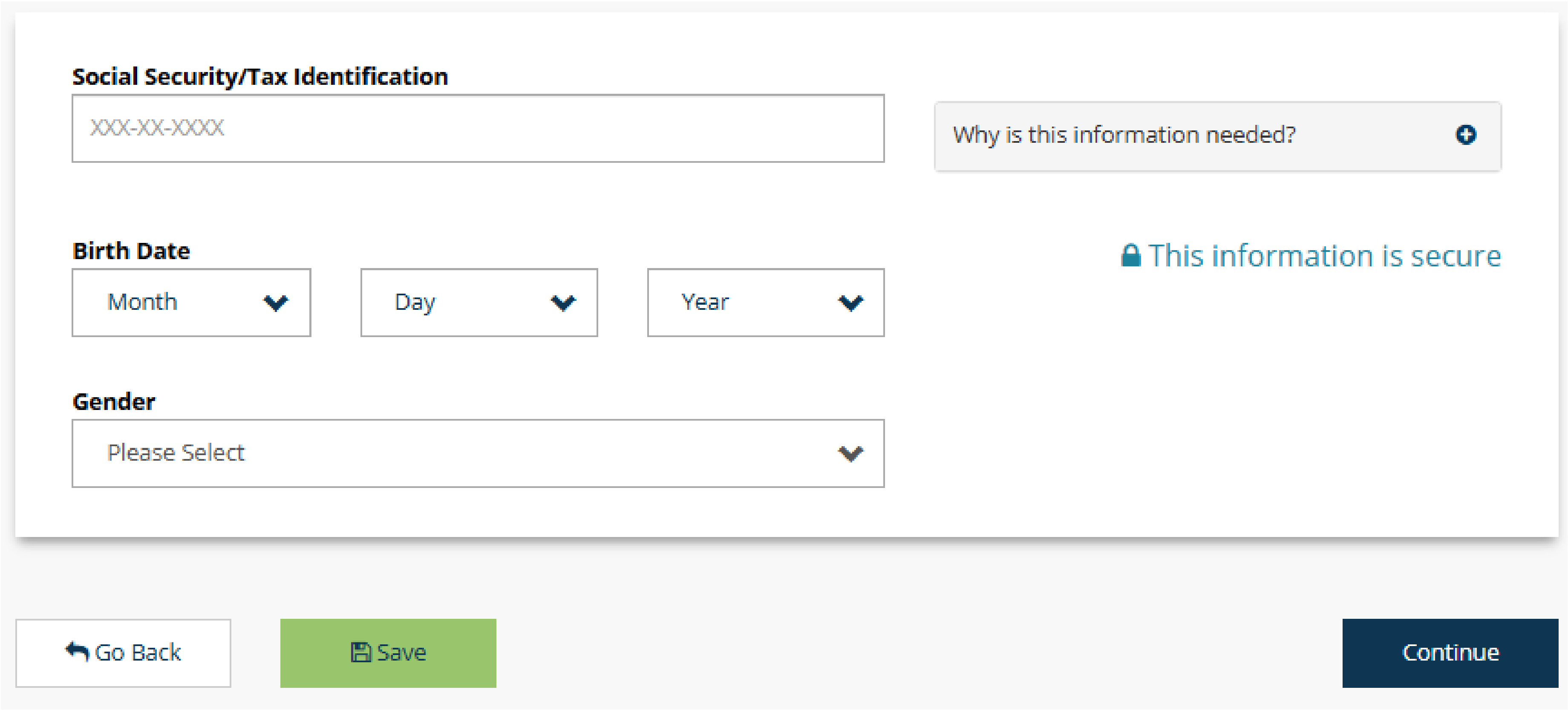
Save

Continue

3) Fill out basic information



4) Fill out basic information (cont'd)



5) 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/Tax Identification

XXX-XX-XXXX

Birth Date

Month

Day

Year

Gender

Please Select

Relationship of Account Owner to Beneficiary

(please select)

Promo Code(optional)

Go Back

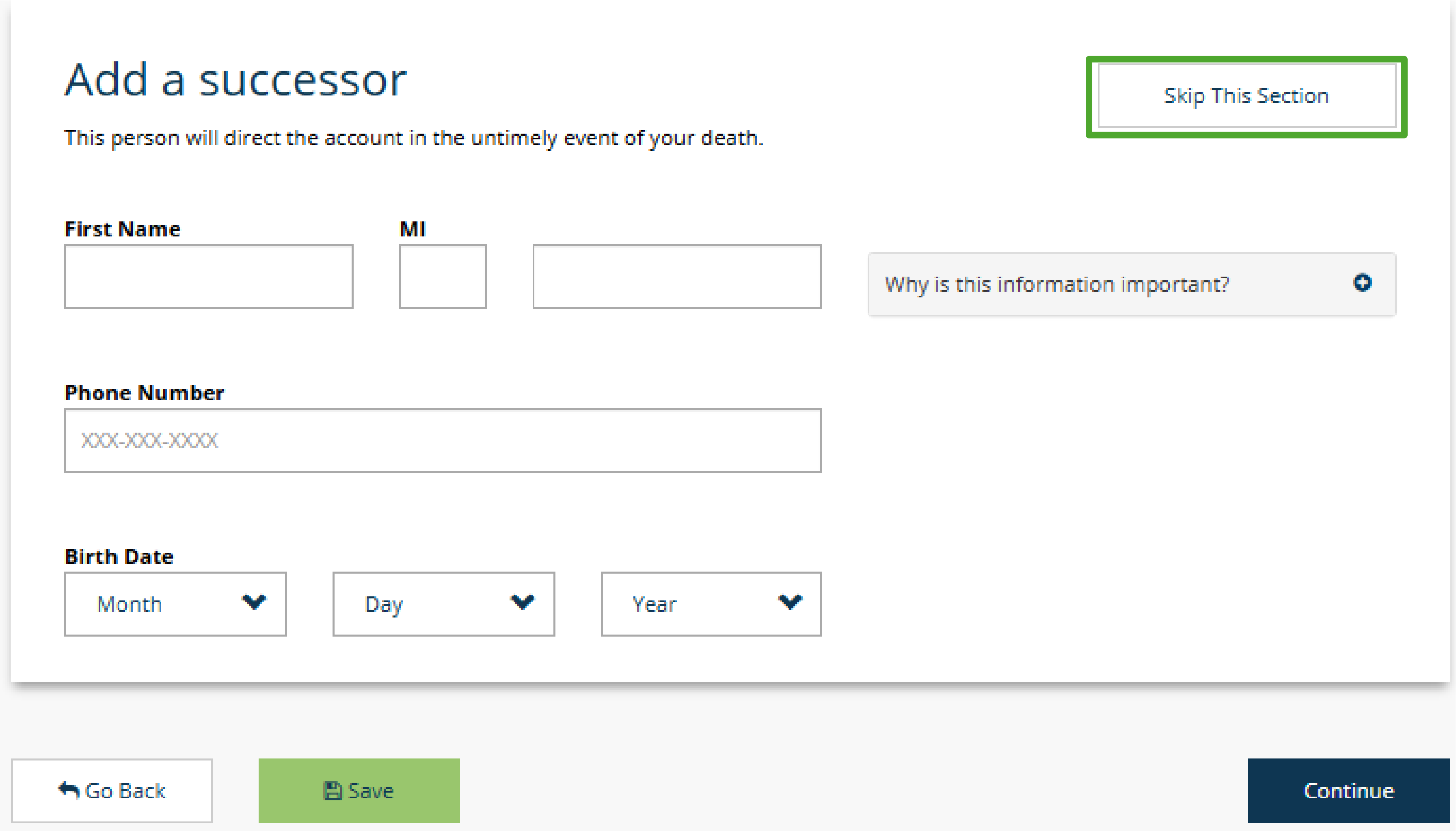
Save

Continue

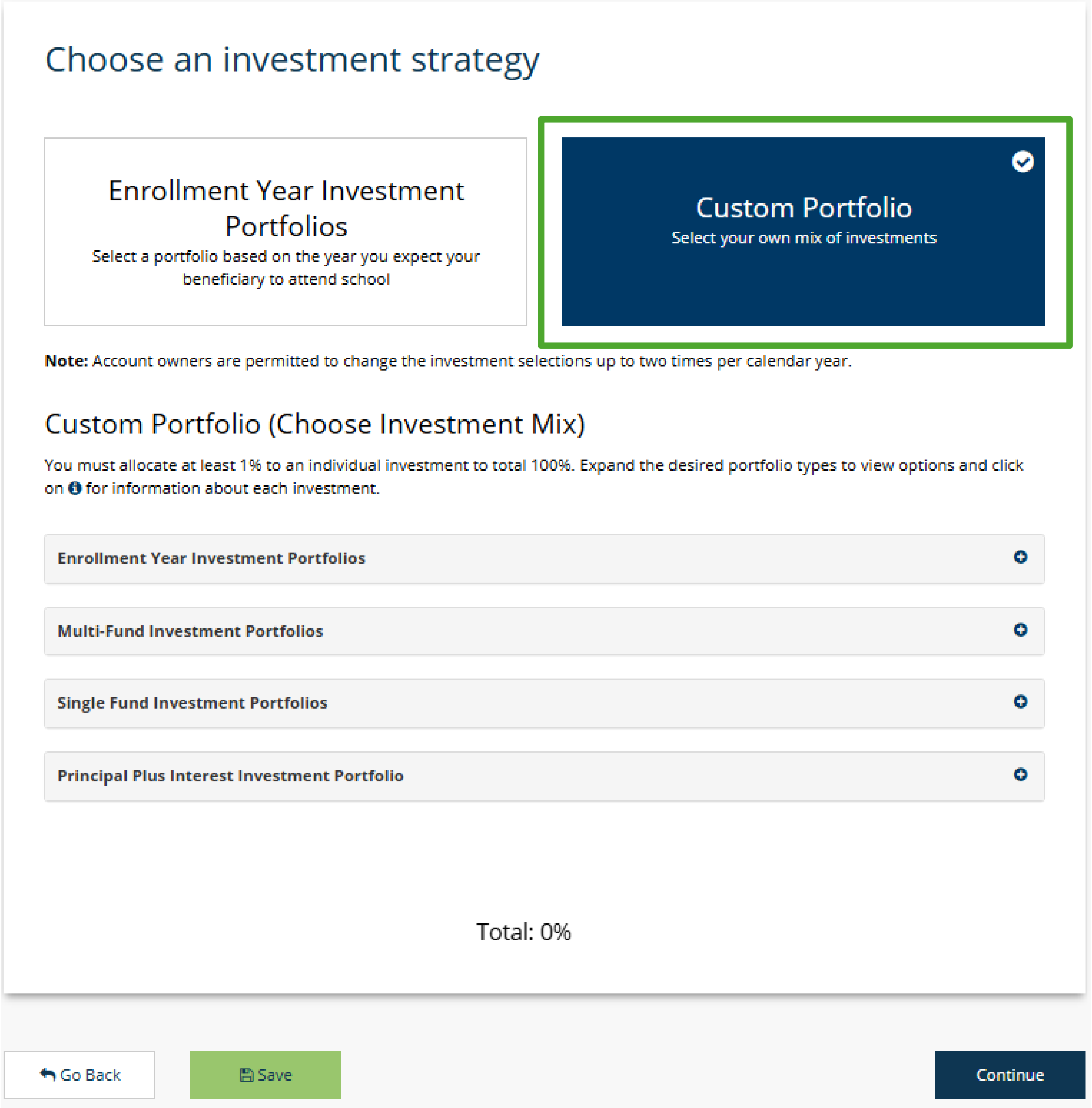
RENEST

6) Add a successor or select “Skip This Section”

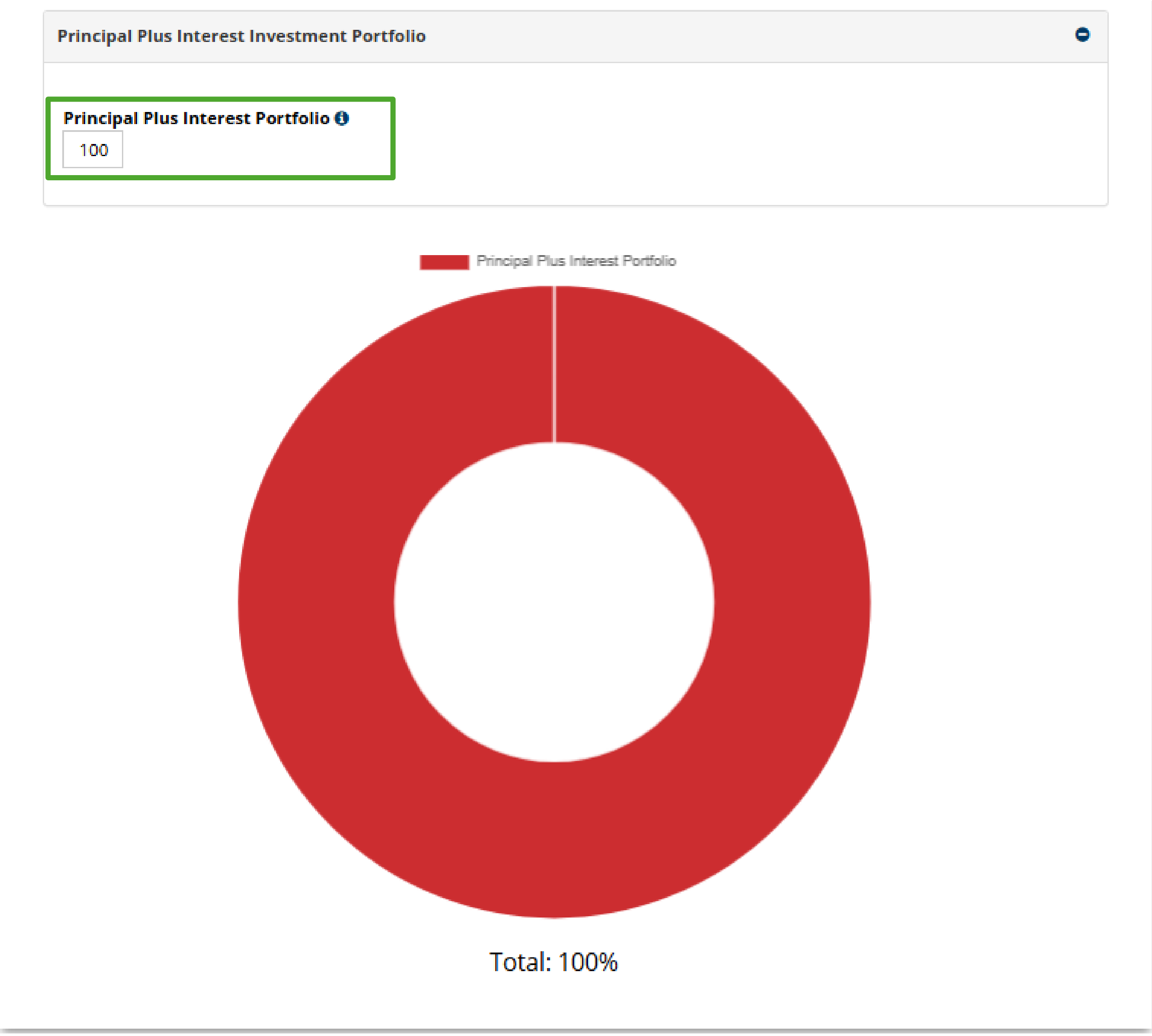
Adding a successor is not necessary to unlock your 529 benefits



7) Select "Custom Portfolio"



8) Open “Principal Plus Interest Investment Portfolio”



Enter 100% for “Principal Plus Interest Portfolio”

How would you like to fund Mo's account?

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:

$0.00

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:

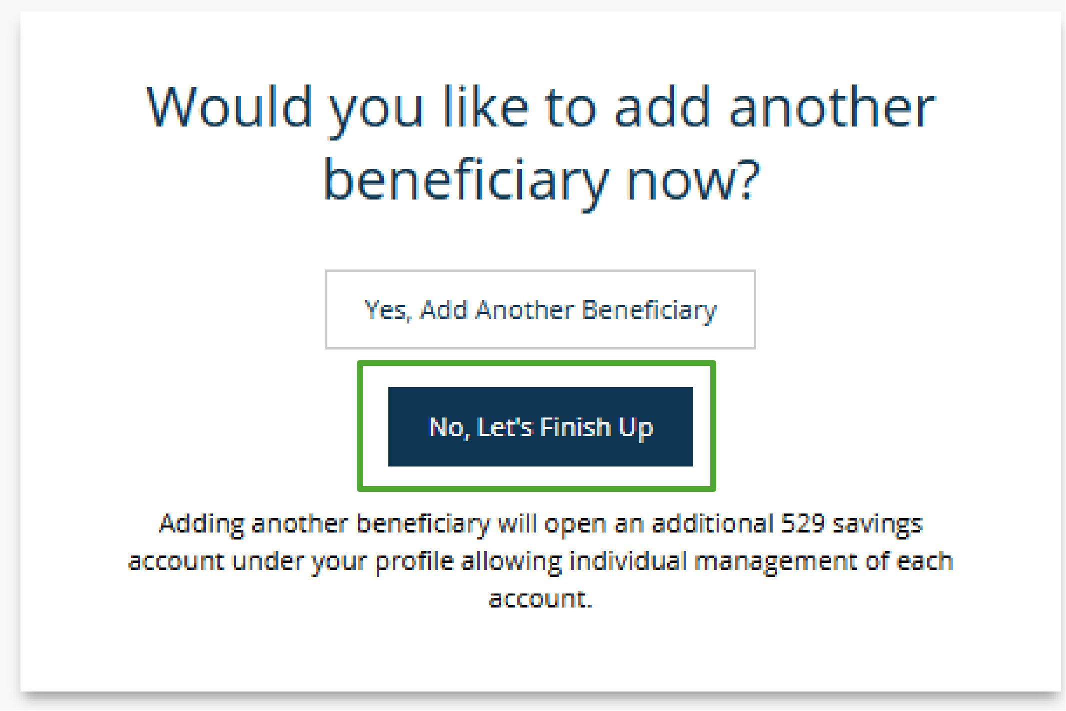
Account Type

(please select)

9) For funding, select "Bank Account" and choose $25 or you can put how much you'll spend on rent this year

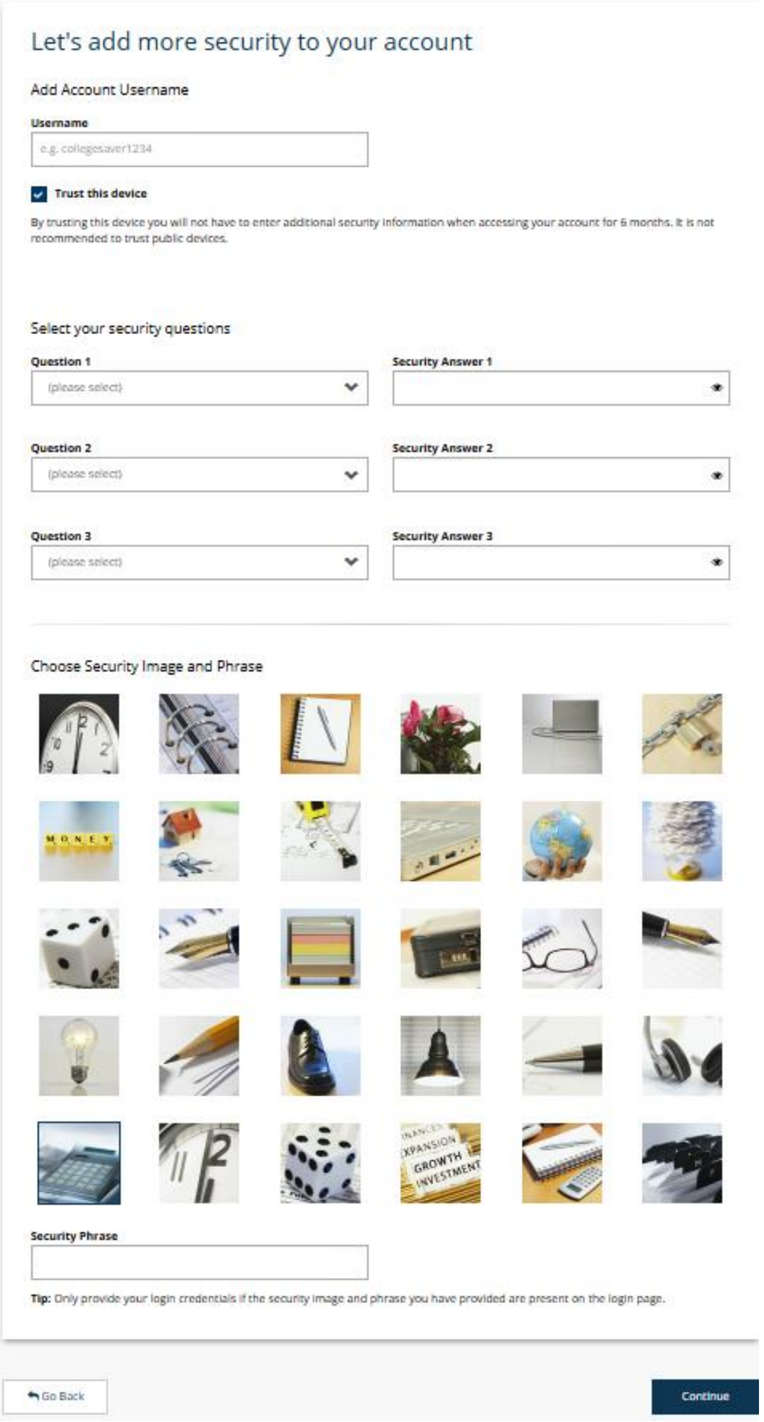
10) Add another beneficiary or select “No, Let’s Finish Up”

Adding another beneficiary is not necessary to unlock your 529 benefits



RENEST

11) Enter account login and security information



RENEST

12) 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

Go Back

Continue

13) 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.edvest.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 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 information regarding electronic delivery and I consent and agree to receive documents electronically as set forth above.**

Go Back

Continue

RENEST

14) 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 Edvest College Savings 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 State of Wisconsin 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 certify that all of the information provided by me on this *Account Application* is, and all information provided by me in

I acknowledge that I have carefully read and consent and agree to the terms set forth in the Edvest College Savings Plan Plan Description.

Sign

RENEST