



# 1) Fill out basic information

## Let's set up your account!

In order to fund your beneficiary's account, you 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

#### ACCOUNT BASICS

Already Started? [Continue Enrollment](#)

All fields are required unless indicated as optional.

ACCOUNT OWNER

## Tell us about yourself

## 2) Fill out basic information

Saved just now 

Please share your information so we can verify your identity

Phone Number

Phone Type



SSN or ITIN

Confirm SSN / ITIN



Date of Birth

MM/DD/YYYY

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

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ACCOUNT OWNER

## What is your address?

We'll need your address to verify your account.

### 3) Fill out basic information

Saved just now 

 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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## 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

### 4) Choose Myself

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Set up your initial contribution or select "Skip this step" to start with a recurring contribution (funded by bank or payroll) or open an account without a contribution.

[Skip this step >](#)

#### Funding Method

Funding Method  
Bank

Routing Number

Bank Name

Account Type

Account Number

Confirm Account Number

#### Bank Account Holder

First Name

Last Name

#### Initial Contribution

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

Contribution Amount  
\$1

Promo Code (optional)

Note: Any added promo code will be applied after account creation and will not be reflected in your review screen.

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**5) Choose Bank for funding method and then scroll down and choose \$1 or you can put how much you'll spend on rent**

## How would you like to invest?

Choose between two strategies that best fits 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

## 6) Choose Build Your Own



### Keep it simple

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



### Build your own

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

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

## Cash and Cash Equivalent

### 7) Choose High Yield Bank Savings Option

Show all | Hide all

- |   |                         |
|---|-------------------------|
| <input checked="" type="checkbox"/> High Yield Bank Savings 529 Portfolio | <a href="#">Details</a> |
| <input type="checkbox"/> Principal Plus Interest 529 Portfolio            | <a href="#">Details</a> |

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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%.

High Yield Bank Savings 529 Portfolio

[Remove](#)

**8) Enter 100%**

100 %

Total Percentage Allocated

100 %

Please remember to revisit your portfolios often as these allocations 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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## DELIVERY METHOD OF DOCUMENTS

Quarterly Statements and Plan Description Updates

Electronic Delivery

Transaction & Profile Confirmations

Electronic Delivery

Tax Forms

Electronic Delivery

- By checking this box, I consent to receive the [Plan Description](#) 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 Description](#) and the [Privacy Policy](#).

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

**9) Make sure everything is  
correct and then select  
electronic delivery and open  
account**

Save and Close

Open Account