1) Gather required information and create an account

Enroll in Future Scholar 529

1 Before you get started...

Before you begin the enrollment process, we suggest that you gather the following required information:

- Account Owner Information (Person who will control the account)
  Name
  Address
  Social Security Number
  Date of Birth
- Designated Beneficiary Information (Person whose educational expenses the account will be used to fund)
  Name
  Address
  Social Security Number
  Date of Birth
- Initial contribution Method (How the account will be funded) Your initial contribution can be made by:
  Check
  Money Order
  Direct deposit from a Coverdell Education Savings Account (Coverdell ESA) or another 529 College Savings Plan (CSP).

  You can also fund your account online, in which case you'll need your bank routing and account numbers, or a copy of a check.

2 Choose Investments

- Review the investment choices to help you identify portfolios that may be right for you.
- See Pricing & Performance for more detailed information about your investment choices.
- Before you invest in Future Scholar, please review the Program Description which contains important information about investment objectives, risks, charges and expenses.

3 Select your enrollment method below

Select "Enroll Online" for easy, paper-free registration – Renest is compatible with online accounts!

Enroll Online

Print & Mail Application

Order An Enrollment Kit

RENEST

2) Select "Yes" to both Eligibility questions

FutureScholar
South Carolina's 529 College Savings Plan

About | FAQ | Resources | Contact

Open an Account

New Customers, Welcome!

Thanks for choosing the Future Scholar 529 College Savings Plan. Opening a new account takes about 15 minutes. Let's get started!

Eligibility

Are you and the beneficiary both U.S. citizens or legal U.S. residents?

(•) Yes ( ) No

Is the account owner or beneficiary a resident of South Carolina?

(•) Yes ( ) No

START*

WHAT YOU NEED TO GET STARTED

You'll need the following for yourself, the student and your optional Successor Owner:

- Date of Birth
- Social Security Number
- Street Address (not PO Box)

You'll also need your:

- Investment Selection Learn More
- Bank Information (for electronic transactions)

Already a customer?

If you already have a college savings account with us, please log in to start a new application.

> Log In

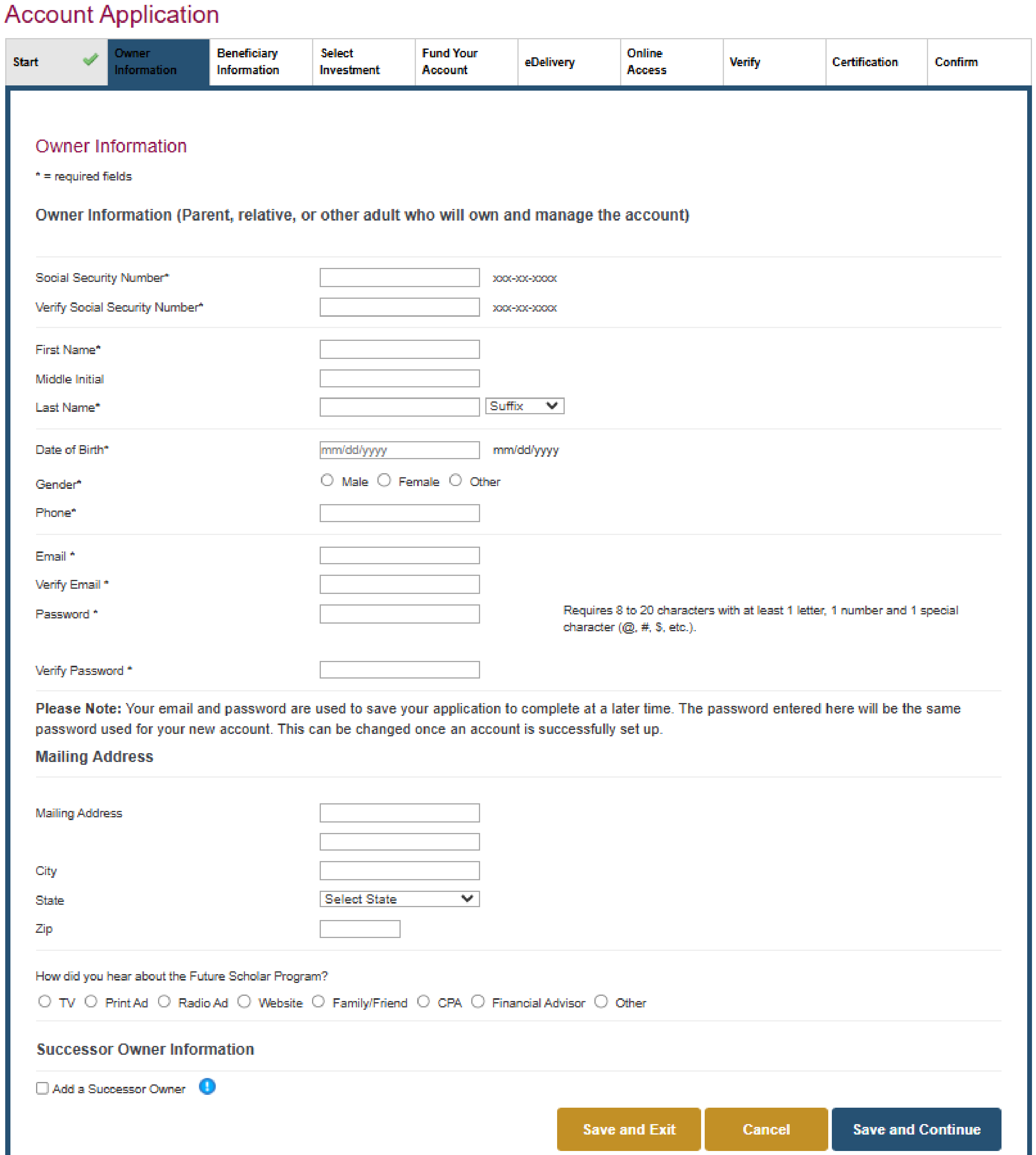
Already started an application?

If you started an online college savings account application, just pick up where you left off.

> Return to your saved application

RENEST

3) Fill out basic information



Account Application

Start | Owner Information | Beneficiary Information | Select Investment | Fund Your Account | eDelivery | Online Access | Verify | Certification | Confirm

Owner Information

* = required fields

Owner Information (Parent, relative, or other adult who will own and manage the account)

Social Security Number* xxx-xx-xxxx
Verify Social Security Number* xxx-xx-xxxx
First Name*
Middle Initial
Last Name* Suffix
Date of Birth* mm/dd/yyyy mm/dd/yyyy
Gender* Male Female Other
Phone*
Email *
Verify Email *
Password * Requires 8 to 20 characters with at least 1 letter, 1 number and 1 special character (@, #, $, etc.).
Verify Password *

Please Note: Your email and password are used to save your application to complete at a later time. The password entered here will be the same password used for your new account. This can be changed once an account is successfully set up.

Mailing Address

Mailing Address
City
State Select State
Zip

How did you hear about the Future Scholar Program?
TV Print Ad Radio Ad Website Family/Friend CPA Financial Advisor Other

Successor Owner Information

Add a Successor Owner

Save and Exit | Cancel | Save and Continue

Adding a successor is not necessary to unlock your 529 benefits

RENEST

4) Select “Yes” for “Are you the Beneficiary”

Account Application

Start	Owner Information	Beneficiary Information	Select Investment	Fund Your Account	eDelivery	Online Access	Verify	Certification	Confirm

Beneficiary Information

The beneficiary is the student who will receive the proceeds from this account.

Account Owner (you):

Are you the Beneficiary? ○ Yes ○ No

Social Security Number* xxx-xx-xxxx

Verify Social Security Number* xxx-xx-xxxx

First Name*

Middle Initial

Last Name* Suffix

Date of Birth* mm/dd/yyyy mm/dd/yyyy

Relationship* Select Relationship of the account owner to the beneficiary.

Gender* ○ Male ○ Female ○ Other

Mailing Address

☐ Beneficiary does not live with Owner

Mailing Address

City

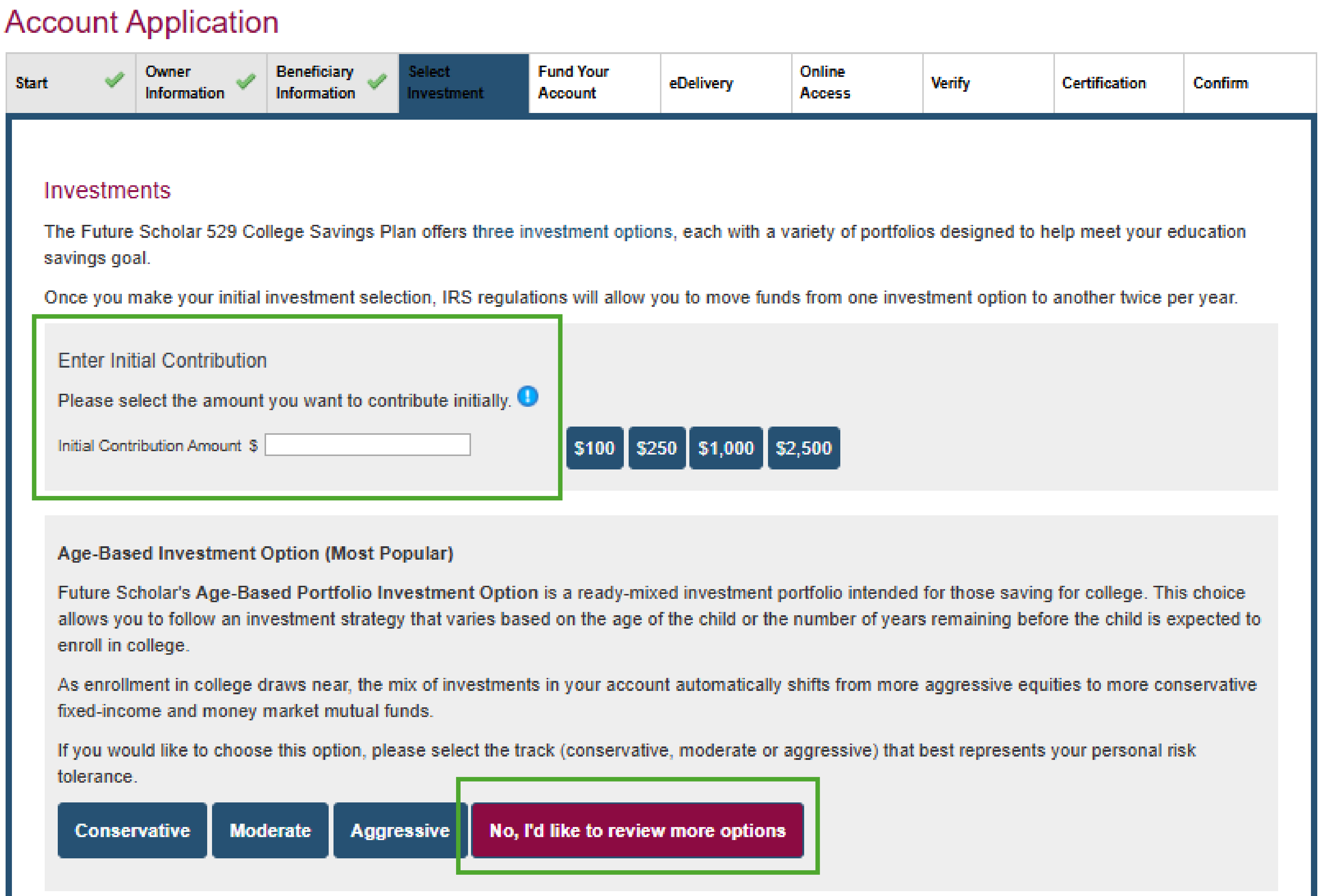
State SOUTH CAROLINA

Zip

Save and Exit | Cancel | Previous | Save and Continue

RENEST

5) For “Initial Contribution Amount” put $1 or you can put how much you’ll spend on rent this year



For “Age-Based Investment Option” select “No, I’d like to review more investment options”

RENEST

Single-fund Investment Option

This investment choice allows you to customize a portfolio by selecting from a variety of offerings, each of which invests in a single underlying fund.

	Allocation %
Future Scholar Bank Deposit Portfolio	100
Future Scholar Bond Index Portfolio	
Future Scholar International Equity Index	
Future Scholar Large Cap Index Portfolio	
Future Scholar Legacy Capital Preservation	
Future Scholar Mid Cap Index Portfolio	
Future Scholar Short Term Bond Index	
Future Scholar Small Cap Index Portfolio	
Future Scholar Tips Bond Etf Portfolio	
Future Scholar Ultra Short Term Bond	
Total	100 %

Save and Exit | Cancel | Previous | Save and Continue

6) Scroll down and under "Single-fund Investment Option" put 100% for Future Scholar Bank Deposit Portfolio

7) Select “Fund Electronically” and enter information for the bank you want to contribute from

Account Application

Start ✓ | Owner Information ✓ | Beneficiary Information ✓ | Select Investment ✓ | Fund Your Account | eDelivery | Online Access | Verify | Certification | Confirm

Fund Your Account

Please select a method to fund your account.

Fund Electronically | Fund by Check

Fund your account electronically. This will allow you to start saving.

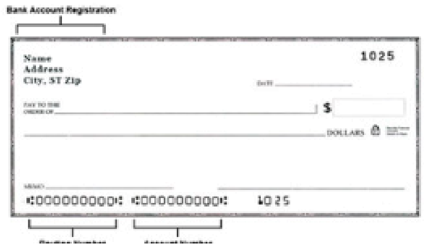
Bank Information

By adding your bank information, you are adding electronic services that will help you manage your account. You will be able to:

- Send electronic contributions from your bank account to your 529 account(s)
- Direct electronic withdrawals from your 529 account to your bank account. Your bank account information must be on file for at least 30 days before withdrawal proceeds can be sent to your bank account.

Bank Account Owner

Name on Bank Account*



Bank Account Information

Please enter your bank account information.

* Required field

Routing Number*

Bank Name

Account Number*

Account Type*

Checking Account

RENEST

8) Select "Paperless" delivery (unless you want mailed statements)

Account Application

Start ✓	Owner Information ✓	Beneficiary Information ✓	Select Investment ✓	Fund Your Account ✓	eDelivery	Online Access	Verify	Certification	Confirm

eDelivery

Paperless statements are a great way to stay organized. Instead of receiving a paper statement in the mail, we'll email you when your statement is available to view online. Choose how you would like to receive important documents. Please note, due to plan regulations, certain document types may still be sent via U.S. Mail if paperless is chosen.

Email Address: mo123@gmail.com

Document Type	Delivery Method	
Select All	◉ Paperless	○ U.S. Mail
Future Scholar Statement	◉ Paperless	○ U.S. Mail
Daily Confirm	◉ Paperless	○ U.S. Mail
Compliance Documents	◉ Paperless	○ U.S. Mail
Tax Forms	◉ Paperless	○ U.S. Mail

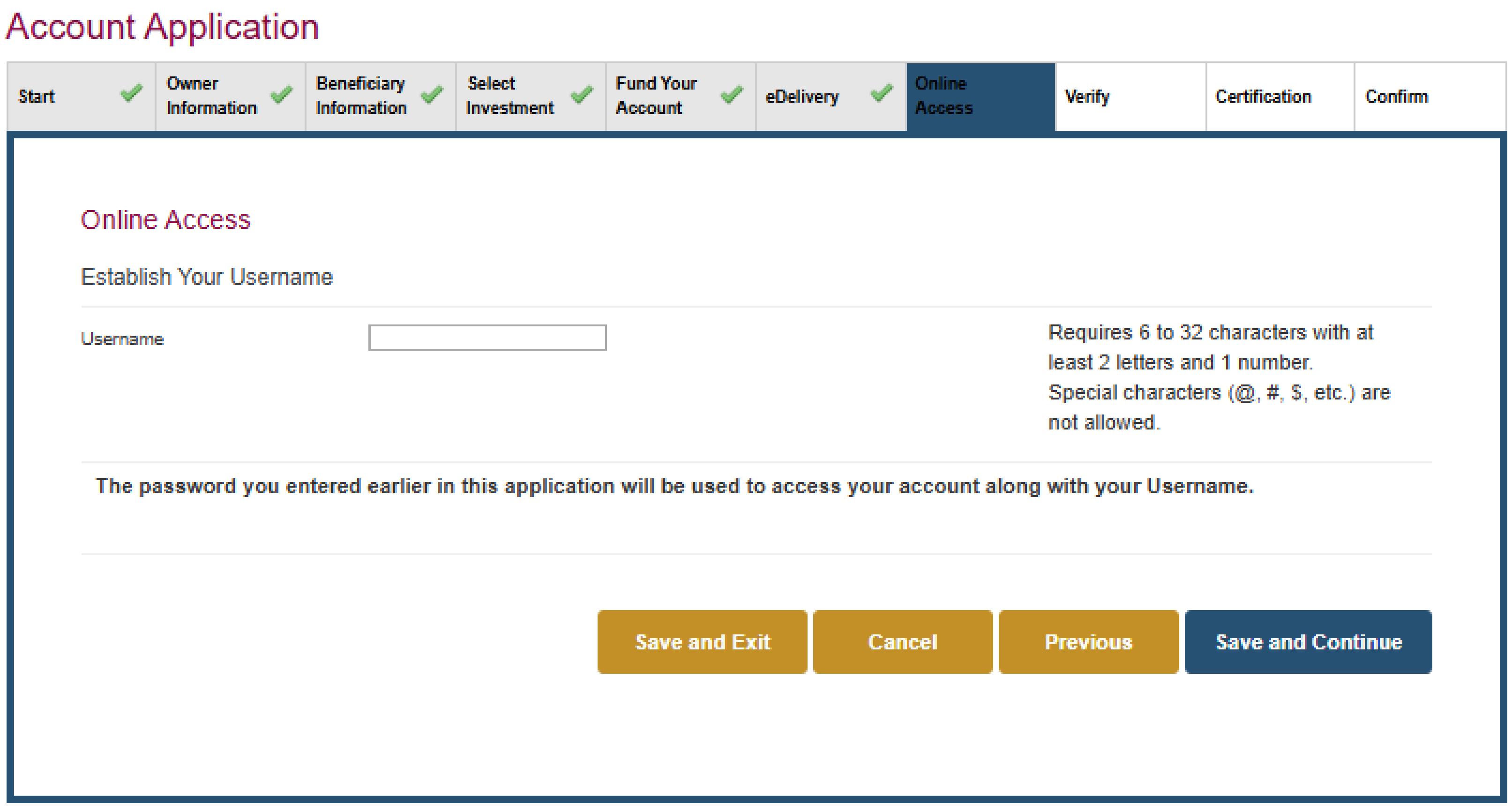
Electronic Delivery Terms of Use

☐ By checking this box, you agree to our electronic delivery terms and conditions, and acknowledge that you can electronically access, view, print and save these documents.

Save and Exit | Cancel | Previous | Save and Continue

RENEST

9) Enter username for your account



10) Make sure all information is entered correctly and continue

Investment Selection

Edit

Portfolio Name	Allocation %	Investment Amount
Future Scholar Bank Deposit Portfolio	100%	$1.00
Total:		**$1.00**

eDelivery Options

Edit

Document Type	Delivery Method
Future Scholar Statement	Paperless
Daily Confirm	Paperless
Compliance Documents	Paperless
Tax Forms	Paperless

Bank Information

You will be funding by check, please use the Contribution Slip provided on the confirmation screen.

Save and Exit | Cancel | Previous | Save and Continue

11) Read and execute certification and then establish your account

Account Application

Start ✓ | Owner Information ✓ | Beneficiary Information ✓ | Select Investment ✓ | Fund Your Account ✓ | eDelivery ✓ | Online Access ✓ | Verify ✓ | Certification | Confirm

Certification

Print

I hereby establish, as the Owner, an Account representing an interest in the Future Scholar 529 College Savings Plan for the Beneficiary to be named on the following page, or add additional Investment Portfolios to my Account, as applicable, and enter into this Participation Agreement relating to the Account. I certify that all of the information contained in this application — and all information that I will provide with respect to my Account(s) — is true, complete and correct and I understand that the Account(s) will be opened based on this information.

1. I certify that I have read, understand and agree to the terms of this Account Application, the Program Description (including the fees and expenses described therein), and the Participation Agreement (attached as Appendix A to the Program Description) and will retain a copy of each for my records.
2. I certify that the funds to be placed in the Account(s) are intended to be used solely to pay Qualified Education Expenses of the Designated Beneficiary(ies).
3. I acknowledge and agree that the Participation Agreement (attached as Appendix A to the Program Description) will govern all aspects of the Accounts, including all Contributions to the Account(s).

☑ **By checking this box and selecting the "Establish Account" button below, I certify, under penalties of perjury, that I am agreeing to the terms and conditions set forth below and in the Participation Agreement for Accounts Owned by Individuals (the "Participation Agreement") contained in the Disclosure Booklet. I understand and agree that the Disclosure Booklet and the Participation Agreement govern all aspects of this Account and are incorporated herein by reference.**

Save and Exit | Cancel | Previous | Establish Account