CollegeInvest®
WE HELP YOU GET THERE

# How to Enroll

## 4 Steps to Open a CollegeInvest 529 Account

Enrolling is simple and takes most people less than 10 minutes. Visit collegeinvest.org, click the OPEN AN ACCOUNT button in the top right corner and follow these steps:

## 1 Select your savings plan. You have four to choose from:

**DIRECT PORTFOLIO**
MOST POPULAR PLAN
Vanguard® ascensus®
Offers age-based, individual and blended portfolios, ranging from conservative to aggressive.

**STABLE VALUE PLUS**
Nationwide®
Protects your principal AND guarantees an annual rate of return.

**SMART CHOICE**
1STBANK
Our FDIC-Insured plan.

**SCHOLARS CHOICE**
nuveen TIAA
For those working with a Financial Professional. Your advisor will open your account on your behalf.

## 2 Enter your personal information.

**Account Owner**
The person who will manage the account and the use of funds on behalf of the Beneficiary.

**Beneficiary**
The person who will use the funds for college, trade school or an apprenticeship.

**Successor Account Owner**
The person who will automatically assume control of the account if the Account Owner dies.

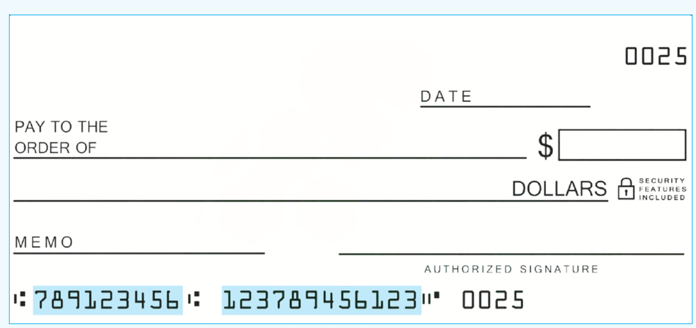
**You'll need:**
Full Name | Social Security Number | Date of Birth | Mailing Address

## 3 Provide initial contribution information.

You can make contributions with a one-time transfer, an automatic contribution plan, or payroll Direct Deposit.

**You'll need:**
-Bank name and routing number
-Checking or savings account number

You can also opt to mail a check.
Mailing instructions are provided online.



ROUTING NUMBER ACCOUNT NUMBER

## 4 Review the disclosure statements online.

You'll then be directed to the appropriate Plan Manager's site to finalize your account. You will also have the ability to finalize setting up direct deposit from your paycheck at that time.