

PAYROLL DIRECT DEPOSIT

Use this form to establish, change or delete payroll direct deposit instructions on your existing Stable Value Plus College Savings account. Complete sections 1 and 2. Print and sign the form in section 4 and submit it to your HR, benefits, or payroll representative. Your employer will then initiate or change your payroll deduction. If you have questions, call 1-(800) 448-2424 or email general@collegeinvest.org.

SECTION 1. Employee Information *(Please print clearly in capital letters)*

STABLE VALUE PLUS ACCOUNT NUMBER 500 _ _ _ _ _	SOCIAL SECURITY NUMBER OR ITIN
ACCOUNT OWNER'S NAME (FIRST NAME, MIDDLE INITIAL, LAST NAME)	
DAYTIME PHONE NUMBER	EVENING PHONE NUMBER

SECTION 2. Payroll Direct Deposit Instructions *(Please print clearly in capital letters)*

Check one: ☐ Start direct deposit ☐ Change amount ☐ Stop direct deposit (Skip to **SECTION 4**)

Deduct \$_____ from my paycheck **EACH PAY PERIOD** for contribution to my Stable Value Plus 529 College Savings account.

Please note:

- ♦ There is a \$15 minimum.
- ♦ If you wish to have your payroll direct deposit contribution divided among more than one beneficiary, you must complete a separate form for each beneficiary.

SECTION 3. Employer Information *(Please print clearly in capital letters)*

When setting up ACH direct deposit for this employee, please use the following information for your transmittal:

ABA NUMBER: 011302920 (MELLON BANK)
STABLE VALUE PLUS ACCOUNT NUMBER: 52500500 _ _ _ _ _

Please note: The account number in Section 3 is a 13 digit field. The first 5 digits identify the bank account of CollegeInvest Stable Value Plus College Savings Plan. The last 8 digits are the employee's Stable Value Plus account number.

SECTION 4. Signature *You must sign below.*

- ♦ I certify that I have read the CollegeInvest Stable Value Plus Plan Disclosure Statement and understand the rules and regulations governing the CollegeInvest Stable Value Plus College Savings Plan.

ACCOUNT OWNER'S SIGNATURE	DATE
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RETURN THE COMPLETED FORM TO YOUR HR, BENEFITS, OR PAYROLL REPRESENTATIVE.