

# The Enrollment Checklist

Now that you're ready to open an account, let's review what you will need during the enrollment process.

## 1) Account Owner

The Account Owner is the person who establishes and maintains the account. They have overall control of the account.

You will need their Full Name, Social Security Number, Date of Birth, Mailing Address and/or U.S. Permanent Address, and Email Address.

## 2) Beneficiary

The Beneficiary is the student who will use the funds for college expenses.

You will need their Full Name, Social Security Number, Date of Birth and Mailing Address.

## 3) Successor Account Owner

You may want to name a Successor Account Owner. A successor account owner becomes the owner of the account in the event of the death of the account owner.

You will need their Full Name, Social Security Number, Date of Birth and Mailing Address.

## AUTOMATIC SAVINGS OPTIONS

You can elect to have automatic deposits to the account from a checking or savings account on a one time basis, or a regular monthly schedule. Or, you can elect to have regular contributions deducted from your paycheck with a *Direct Deposit* plan.

Forms are available on our website.

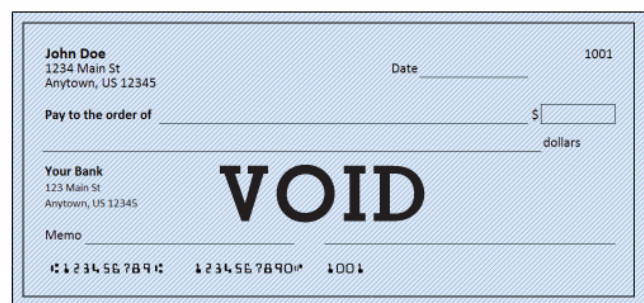
## 4) Initial Contribution

If you would like to make your contribution by mail, look on our website for your particular plan and follow those instructions on where to send your check.

If you would like to make your initial contribution electronically or want to establish an ongoing automatic contribution plan, you will need:

- ♦ A. *Bank account number*
- ♦ B. *Bank routing number*
- ♦ C. *A voided check may need to be submitted*

That's all you need. Congratulations, you're on your way! If you have any questions, let us know!



123456789  
routing transit number

12345678901  
account number

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