



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



Offers age-based, individual and blended portfolios, ranging from conservative to aggressive.

STABLE VALUE PLUS



Protects your principal AND guarantees a 1.79% annual rate of return for 2023 (net of fees).

SMART CHOICE



Our FDIC-Insured plan.

SCHOLARS CHOICE



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.

		0025
		DATE _____
PAY TO THE ORDER OF _____	\$	
		DOLLARS SECURITY FEATURES INCLUDED
MEMO _____		AUTHORIZED SIGNATURE _____
⑆ 789123456 ⑆	⑆ 123789456123 ⑆	0025
<small>ROUTING NUMBER</small>	<small>ACCOUNT NUMBER</small>	

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.