

# HOW TO ENROLL IN THE SSgA UPROMISE 529 PLAN

Before you start, have the following ready:

- A Your information:** Social Security number or tax identification number, address (not a P.O. box), and date of birth. (Note: You must be a U.S. citizen or resident alien to enroll.)
- B Your beneficiary's information:** (The beneficiary is the child you're saving for.) Social Security number or tax identification number, address (not a P.O. box), and date of birth. (Note: The beneficiary must be a U.S. citizen or resident alien.)
- C How you'd like your money to be invested:** College Date, Risk-Based, Static or Savings Portfolios. (You can read about them on the Plan website and in the Plan's Disclosure Statement, available **online**.)
- D How you'd like to receive statements:** You can receive them by email ("go green" and be paper-efficient) or by mail (paper-based).

## Now you're ready to enroll.

Go to [www.nevadas529.com](http://www.nevadas529.com), click on **Open a 529 account** in the upper-right-hand corner, and then select **Open an account today**.

Follow the online instructions, filling in information as requested. When you reach **Fund Your Account**, select **Into My Future**. (The initial contribution is waived if the beneficiary is participating in an **Into My Future** pledge event.)

Continue until the enrollment is completed. If you'd like to set up your Ugift event now (for pledging), select **View your 529 Plan account** and continue with the following instructions.



**CLICK**  
Open a 529 account



**SELECT**  
Into My Future



**CLICK**  
Go to my account



# HOW TO USE UGIFT® - GIVE COLLEGE SAVINGS TO MAKE PLEDGING EASIER

When you create a Ugift “event” for the Into My Future event, an invitation and a specially coded gift coupon will be sent to everyone whose emails you supply. When family and friends mail back their pledge checks with the gift coupon, the coupon’s code will link it to your 529 plan account.

If you are on the [View your 529 Plan account](#) screen, click on the Ugift button to the right.

- 1 Choose “Online” to create emailed invitations.
- 2 Click on the “Into My Future Participants” box and add the date (if you know it).
- 3 You can see what your invitation will look like. There will be a special “P.S.” message explaining what the event is and why you are asking them to pledge. There will also be a link to [intomyfuture529.com](http://intomyfuture529.com) so they can read more about the event.
- 4 Enter the names and email addresses of family members and friends you’d like to invite to pledge for your student. You can also print out extra invitations and gift coupons to hand out or mail. Please be assured that email addresses you type in for invitations will not be used for any other purpose.

If you don’t have email addresses, you can print extra coupons to hand out or mail.

**Forget to invite someone?** Log back into your account and go back to the Ugift page. After you click on [See my existing events](#) at the top of the page, you’ll be able to add email addresses or print out more coupons. You can also check to see who has sent in pledges.

**For more information about the SSgA Upromise 529 Plan call 1-800-587-7305 or visit [www.ssga.upromise529.com](http://www.ssga.upromise529.com) to obtain a Plan Description and Participation Agreement. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing. Upromise Investments, Inc., Distributor.**

**If you are not a Nevada taxpayer, consider before investing whether your or the beneficiary’s home state offers any state tax or other benefits that are only available for investments in such state’s qualified tuition program.**

The SSgA Upromise 529 Plan (Plan) is administered by the Board of Trustees of the College Savings Plans of Nevada (Board), chaired by Nevada State Treasurer Kate Marshall. Upromise Investments, Inc (UII) serves as the Program Manager. UII has overall responsibility for the day-to-day operations, including distribution of the Plan and provision of certain marketing services. State Street Global Advisors (SSgA) serves as Investment Manager for the Plan except for the Savings Portfolio, which is managed by Sallie Mae Bank, and also provides or arranges for certain marketing services for the Plan. The Plan’s Portfolios invest in either (i) Exchange Traded Funds and mutual funds offered or managed by SSgA or its affiliates; or (ii) a Federal Deposit Insurance Corporation (FDIC)-insured omnibus savings account held in trust by the Board at Sallie Mae Bank. Upromise, Inc., UII and Sallie Mae Bank are affiliates. Except for the Savings Portfolio, investments in the Plan are not insured by the FDIC. Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns will vary depending upon the performance of the Portfolios you choose. Except to the extent of FDIC insurance available for the Savings Portfolio, you could lose all or a portion of your money by investing in the Plan, depending on market conditions. Account Owners assume all investment risks as well as responsibility for any federal and state tax consequences.

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**CLICK**  
Ugift button

## STEP 1

**STEP 1**  
How are you going to send the invitation? (choose one)

Online (the easiest)  
We'll help you create an electronic invitation and gift coupon — we'll even email them for you.

Mail/In Person  
You can print special gift coupons to send (or hand) to your family and friends.

## STEP 2

**STEP 2**  
Fill in a description of the upcoming celebration (birthday, holiday, graduation, etc.) and its date.

[Walk into My Future participants click here](#)

Celebration Title:

Celebration Date:

## STEP 3

**STEP 3**  
[Click here to hide your message to your invited recipients.](#)

Dear (Guest),

We'd like to let you know about (Name)'s upcoming celebration.

If you are thinking about giving a gift for the occasion, please consider making a contribution to (Name)'s 529 college savings plan instead. This is a special account we opened to help save for (Name)'s college expenses. We can't think of a more meaningful gift than helping (Name) make the dream of college possible.

## STEP 4

**STEP 4**  
Enter names and email addresses. Emailed recipients will receive information on how to make gift contributions to your 529 account, along with your message (see above). Family and friends can give a gift of \$15.00 or more.

If there are people for whom you don't have an email address, or who don't use email, you can print out a gift coupon to mail or deliver in person. (See Step 1 above for this option.)

Please send email invitations to the following:

	First Name:	Last Name:	Email:
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Click here to email additional invitations](#)