

HOW TO ENROLL IN THE COLLEGECHOICE 529 DIRECT SAVINGS PLAN

Before you start, have the following at hand:

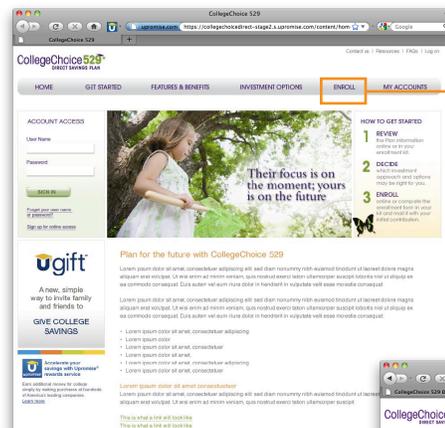
- A** **Your information:** Social Security number or tax identification number, address (not a P.O. box), and date of birth. (Note that you must be a U.S. citizen or resident alien.)
- B** **Your beneficiary's information:** (The beneficiary is the child you're saving for.) Social Security number or tax identification number, address (not a P.O. box), and date of birth. (Note that the beneficiary must be a U.S. citizen or resident alien.)
- C** **How you'd like your money to be invested:** One-step Age-Based Option, do-it-yourself Individual Portfolios, or a combination of both. (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.

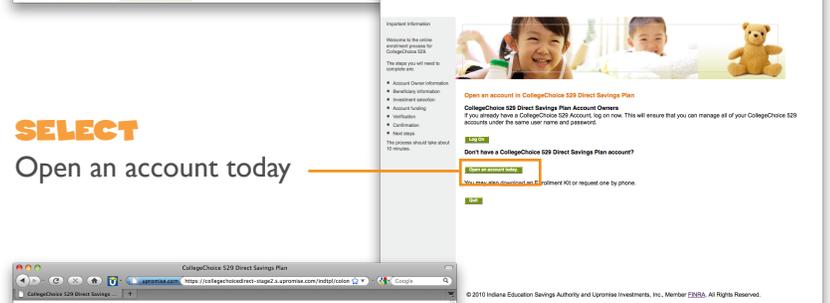
Go to **www.collegechoicedirect.com**, click on **Enroll** in the gray bar, and then select **Open an account today**.

Follow the online instructions, filling in information as requested.

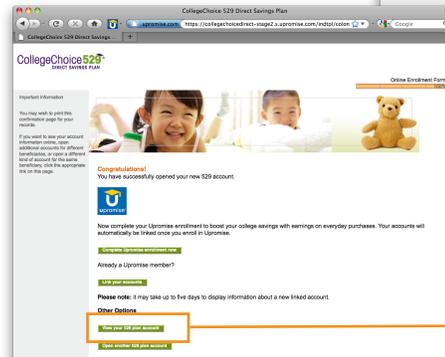
Continue until the enrollment is completed. If you'd like to set up your Ugift event now (for pledging), select **View your 529 Plan account** and continue with the following instructions.



CLICK
ENROLL



SELECT
Open an account today



CLICK
View your 529
Plan account

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

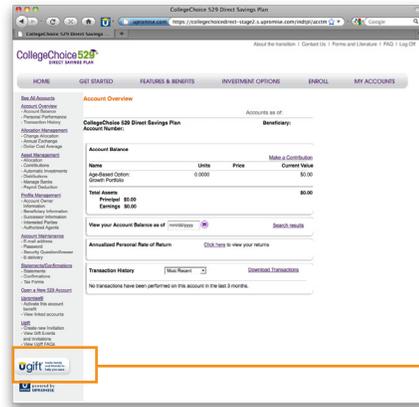
When you create a Ugift “event” for the Walk, an invitation and a specially coded gift coupon will be sent to everyone whose emails you supply. When family and friends mail back their pledge checks with the gift coupon, the coupon’s code will link it to your 529 account.

If you are on the View your 529 Plan account screen, click on the Ugift button to the left.

- 1 Choose “Online” to create emailed invitations.
- 2 Click on the “Walk Into My Future Participants” box and add the Walk date (if you know it).
- 3 You can see what your invitation will look like. There will be a special “PS.” message explaining what the Walk is and why you are asking them to pledge. There will also be a link to walkintomyfuture.com/indiana 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.



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's] 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](#)

For more information about the CollegeChoice 529 Direct Savings Plan, call 1.866.485.9415 or visit www.collegechoicedirect.com to obtain a Disclosure Statement which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Upromise Investments, Inc. Distributor and Underwriter.

If you are not an Indiana 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.

CollegeChoice 529 Direct Savings Plan (Plan) is administered by the Indiana Education Savings Authority. Upromise Investments, Inc. serves as the Program Manager and Upromise Investment Advisors, LLC, provides investment advisory services and recordkeeping and administrative services. Upromise Investments, Inc. and Upromise Investment Advisors, LLC have overall responsibility for the day-to-day operations, including marketing and distribution of the Plan. Dodge & Cox; Frontegra Asset Management, Inc.; The Vanguard Group, Inc.; and Western Asset serve as Investment Managers for the Plan. The Plan’s Portfolios, although they invest in mutual funds, are not mutual funds. Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns are not guaranteed, and you could lose money by investing in the Plan.

© 2010 Indiana Education Savings Authority and Upromise Investments, Inc. Upromise and the Upromise logo are registered service marks of Upromise, Inc. All other marks are the property of their respective owners. IN2168F 0510