CollegeChoice Advisor 529 Savings Plan employee payroll deduction enrollment procedures

Employees who wish to participate in the Plan and fund their account(s) by payroll deduction can do so either by enrolling online or by submitting a paper Enrollment Form. For more information about the CollegeChoice Advisor 529 Savings Plan ("Plan"), contact your Financial Advisor.

PREFILL ONLINE:

Step 1

Log into your account at **collegechoiceadvisor529.com** and select "Payroll Deduction" under the "Asset Management" section of the online enrollment process.

Step 2

Enter the payroll deduction information and print out the Payroll Deduction Authorization Form during online enrollment. This form will be pre-filled with the account owner's name, the total payroll deduction amount, your unique account number, and the routing (ABA) number for the Plan's bank.

If you are funding more than one account by payroll deduction, the amount deducted per pay period should be the sum of all your payroll contributions.

Step 3

Submit the Payroll Deduction Authorization Form to the appropriate Human Resources, Benefits, or Payroll department.

Step 4

The appropriate department will update the payroll deduction amount in the payroll system and begin the process of sending contributions to the Plan.

NEW ACCOUNT ENROLLMENT

Payroll Deduction can be set up when creating a new account. Just be sure to select, "Payroll deduction" in the "Initial Contribution" section of your Enrollment Form.

PAPER-BASED ENROLLMENT:

Step 1

Ask your advisor for a **Payroll Deduction Form.**

Step 2

The completed Payroll Deduction Form will need to be mailed to: CollegeChoice Advisor 529 Savings Plan, P.O. Box 219354, Kansas City, MO 64121.

Step 3

Once the Form is processed, you will be mailed a Payroll Deduction Confirmation Form, which you must sign and submit to your employer's payroll department. Your payroll deduction instructions will not take effect until your employer has accepted your signed form.

Step 4

Submit the Payroll Deduction Confirmation Form to the appropriate Human Resources, Benefits, or Payroll department.

Step 5

The appropriate department will update the payroll deduction amount in the payroll system and begin the process of sending contributions to the Plan.



Payroll Deduction Authorization Form

 Complete this form to start, change, or stop payr (CollegeChoice Advisor) Account(s). You may als www.collegechoiceadvisor529.com. (If you Enrollment Form.) 	o provide your payroll deduction	n instructions when you log on to our web	site at
 After we process this form, you will receive a Pa payroll department. Your payroll deduction instru 			
 Type in your information and print out the compl address below. Do not staple. 		, , , , , , , , , , , , , , , , , , , ,	
Forms can be downloaded from our website at ww assistance in completing this form — at 1.866.485 .			n—or request
Roturn this form and any other requi	red documents to: Ear ow	project delivery or registered mail cond to	.
Return this form and any other requi CollegeChoice Advisor 529 Savin P.O. Box 219354 Kansas City, MO 64121	ngs Plan Colleg 920 M	ernight delivery or registered mail, send to JeChoice Advisor 529 Savings Plan ain Street, Suite 900 Is City, MO 64105	
CollegeChoice Advisor 529 Savin P.O. Box 219354	ngs Plan Colleg 920 M	jeChoice Advisor 529 Savings Plan ain Street, Suite 900	

More ways to save: Ugift® and Upromise®

Ugift lets you invite family and friends to celebrate milestones with a gift contribution to your Plan account. For information, log on to your account and click on the Ugift link.

Upromise is a free service designed to help families save more for college. You can earn college savings on eligible everyday purchases when you shop online, dine out, and much more. The extra money from your Upromise account can add up over time when it's automatically transferred to your Plan account on a periodic basis. To learn more, visit **collegechoiceadvisor529.com** and click on the Upromise logo.

For more information about the CollegeChoice Advisor 529 Savings Plan ("CollegeChoice Advisor"), contact your financial advisor, call 1.866.485.9413, or visit www.collegechoiceadvisor.com to obtain a Disclosure Statement, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Ascensus Broker Dealer Services, Inc. ("ABD") is Distributor of CollegeChoice Advisor.

If you are not an Indiana taxpayer; before you invest, consider whether your or the beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in that state's qualified tuition program.

CollegeChoice Advisor is administered by the Indiana Education Savings Authority (Authority). ABD, the Program Manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services, and marketing. CollegeChoice Advisor's Portfolios invest in: (i) exchange-traded funds; (ii) mutual funds; or (iii) an FDIC-insured omnibus savings account held in trust by the Authority at Sallie Mae Bank. Except for the Savings Portfolio, investments in CollegeChoice Advisor are not insured by the FDIC. Units of the Portfolios are municipal securities and the value of the 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, depending on market conditions, you could lose all or a portion of your money by investing in CollegeChoice Advisor. Account Owners assume all investment risks as well as responsibility for any federal and state tax consequences.

Not FDIC-Insured (except for the Savings Portfolio). No Bank, State or Federal Guarantee. May Lose Value.