

# 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.

**CollegeChoiceAdvisor**  
529 SAVINGS PLAN

- Forms can be downloaded from our website at [www.collegechoiceadvisor529.com](http://www.collegechoiceadvisor529.com), or you can call us to order any form—or request assistance in completing this form—at **1.866.485.9413** any business day from 8 a.m. to 8 p.m. Eastern time.

**CollegeChoice Advisor 529 Savings Plan**  
**920 Main Street, Suite 900**  
**Kansas City, MO 64105**

□□□□ - □□□□ - □□□□

## CSINA 04336D 1117