

Future Path 529 Plan

Employee payroll direct deposit enrollment procedures

ONLINE ENROLLMENT:

Step 1

Follow the online enrollment instructions at futurepath529.com and select “Payroll Deduction” under the “Funding Your Account” section of the online enrollment process.

Step 2

Enter the payroll direct deposit information and print out the **Payroll Direct Deposit Authorization Form** during online enrollment. This form will be pre-filled with the account owner’s name, the total payroll direct deposit 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 direct deposit, the amount deducted per pay period should be the sum of all your payroll contributions.

Step 3

Submit the **Payroll Direct Deposit Authorization Form** to the appropriate Human Resources, Benefits, or Payroll department.

Step 4

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

PAPER-BASED ENROLLMENT:

Step 1

Download an enrollment kit at futurepath529.com, or call the Plan toll-free at **1.877.486.9251** to receive one by mail.

Step 2

Complete the **Enrollment Form** and select “Payroll Deduction” as the method of funding the account in the “Initial Contribution Method” section of the form.

Step 3

Mail the completed **Enrollment Form** to Future Path 529, P.O. Box 55578, Boston, MA 02205-5578.

Step 4

Once the **Enrollment Form** is processed, you will be mailed a **Payroll Direct Deposit Authorization Form**. This form will be pre-filled with the account owner’s name, the total payroll direct deposit 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 direct deposit, the amount deducted per pay period should be the sum of all your payroll contributions.

Step 5

Submit the **Payroll Direct Deposit Authorization Form** to the appropriate Human Resources, Benefits, or Payroll department.

Step 6

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

More ways to save: Ugift®

Ugift allows you to invite family and friends to celebrate occasions with gift contributions to your Future Path 529 account. For information, log on to your account and click on the Ugift link.



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Nevada State Treasurer



J.P.Morgan
ASSET MANAGEMENT

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Payroll Direct Deposit Authorization Form

Step 1. (FOR EMPLOYEES): Complete this form and return to your employer

Please print this page, sign it, include your Social Security number and the date, and submit it to the HR, benefits, or payroll representative responsible for administering payroll deduction contributions to the Future Path 529 Plan. Your employer will initiate or change your payroll deduction after they receive this form.

Employee Name: Sample Employee

Total amount to be deducted per pay period: \$0.00

Employee Signature _____

Employee SSN _____

Date _____

Step 2. (FOR EMPLOYERS): Establish Payroll Deduction Instructions on Your Payroll System

When updating ACH direct deposit instructions for this employee, please make sure that you provide the following information with your transmittal:

1. ABA Number 011001234 (Mellon Bank)
2. Account Number 529 + [9 digit account #]
3. Code Transmittal for Checking

Note: The account number is a 12-digit field. The first 3 digits identify the bank account of Future Path 529 Plan. The last 9 digits are the first nine digits of the employee's Future Path 529 account number.

For Employers Transmitting Funds by Check

If you are submitting payroll deduction contributions by check, please mail the check to the appropriate address below, along with a corresponding list containing the name, account number, and contribution amount for each participating employee:

By U.S. mail:
Future Path 529 Plan
P.O. Box 55578
Boston, MA 02205-5578

By registered, certified or overnight mail:
Future Path 529 Plan
95 Wells Avenue, Suite 155
Newton, MA 02459

Ugift is a registered service mark.

For more information about the Future Path 529 Plan, visit futurepath529.com to download the Plan Description and Participation Agreement or request one by calling 1-800-587-7305. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing.

Before you invest, consider whether your state 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.

The Future Path 529 Plan (the "Plan") is administered by the Board of Trustees of the College Savings Plans of Nevada (the "Board"). Ascensus College Savings Recordkeeping Services, LLC ("Ascensus") serves as the Program Manager. Ascensus has overall responsibility for the day-to-day operations, including provision of certain marketing services. J.P. Morgan Investment Management Inc. ("JPMIM") serves as the Investment Manager of the Plan and JPMorgan Distribution Services, Inc. ("JPMDS") markets and distributes the Plan. JPMorgan Distribution Services, Inc. is a member of FINRA.

The Plan's Portfolios invest in exchange traded funds, mutual funds and a separately managed account offered or managed by JPMIM; Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

No guarantee: None of the State of Nevada, its agencies, the Federal Deposit Insurance Corporation, J.P. Morgan Investment Management Inc., Ascensus College Savings Recordkeeping Services, LLC, JPMorgan Distribution Services, Inc., nor any of their applicable affiliates insures accounts or guarantees the principal deposited therein or any investment returns on any account or investment portfolio.

Investing involves risk, including the risk of loss of principal. Investment returns will vary depending upon the performance of the Portfolios you choose. 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. None of the Board, Ascensus, JPMIM or JPMDS and their respective affiliates provide legal or tax advice. This information is provided for general educational purposes only. This is not to be considered legal or tax advice. Investors should consult with their legal or tax advisors for personalized assistance, including information regarding any specific state law requirements.

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