

## SSgA Upromise 529 Plan

### Employee payroll direct deposit enrollment procedures

#### ONLINE ENROLLMENT:

##### Step 1

Follow the online enrollment instructions at [nevadas529.com](http://nevadas529.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 [nevadas529.com](http://nevadas529.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 SSgA Upromise 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® – Give College Savings

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



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SSgA Upromise529  
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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 SSgA Upromise 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 SSgA Upromise 529 Plan. The last 9 digits are the first nine digits of the employee's SSgA Upromise 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:

SSgA Upromise 529 Plan  
P.O. Box 55578  
Boston, MA 02205-5578

#### By registered, certified or overnight mail:

SSgA Upromise 529 Plan  
95 Wells Avenue, Suite 155  
Newton, MA 02459

**For more information about the SSgA Upromise 529 Plan ("the Plan") 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. Ascensus Broker Dealer Services, Inc. ("ABD") is distributor of the Plan.**

*Before investing in the Plan, you should consider whether your or the beneficiary's home state offers a 529 plan that provides its taxpayers with favorable state tax and other benefits that are only available through investment in the home state's 529 plan.*

The SSgA Upromise 529 Plan (the "Plan") is administered by the Board of Trustees of the College Savings Plans of Nevada (the "Board"), chaired by Nevada State Treasurer. Ascensus Broker Dealer Services, Inc. serves as the Program Manager. ABD 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. 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.

"SPDR" is a registered trademark of Standard & Poor's Financial Services LLC ("S&P") and has been licensed for use by State Street Corporation. No financial product offered by State Street Corporation or its affiliates is sponsored, endorsed, sold or promoted by S&P or its affiliates, and S&P and its affiliates make no representation, warranty or condition regarding the advisability of buying, selling or holding units/shares in such products.

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