

# The Enrollment Checklist

What you will need to have ready during the enrollment process.

## 1) Account Owner

- Determine the **Account Owner**, the person who establishes and maintains the account. They have overall control of the account.
- You will need their **Full Name, Social Security Number, Date of Birth, Mailing Address** and/or **U.S. Permanent Address** handy.

## 2) Beneficiary

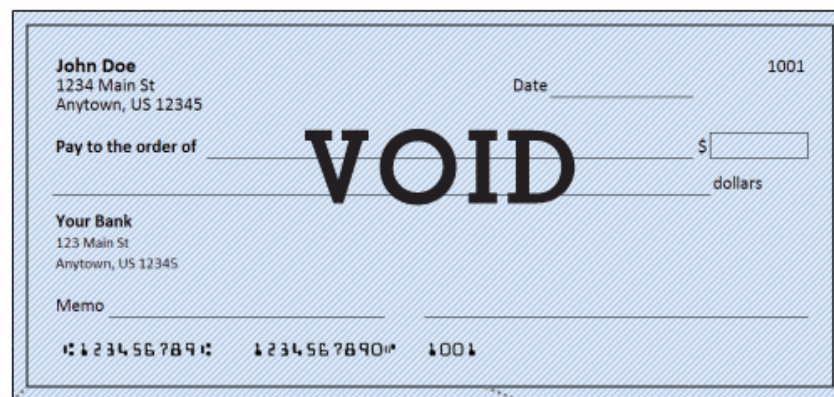
- Determine the **Beneficiary** on the account. The beneficiary is the student who will use the funds for college expenses.
- You will need their **Full Name, Social Security Number, Date of Birth** and **Mailing Address**.

## 3) Successor Account Owner

- Decide if you want to name a **Successor Account Owner**. A successor account owner becomes the owner of the account in the event of the death of the account owner.
- You will need their **Full Name, Social Security Number, Date of Birth** and **Mailing Address**.

## 4) Initial Contribution

- If choosing to make your initial contribution electronically or are choosing to establish an ongoing automatic contribution plan, you will need:
  - a. Bank account number
  - b. Bank routing number
  - c. A voided check **may** need to be submitted



⑆ 123456789 ⑆

routing transit number

⑆ 12345678901 ⑆

account number

### Important Considerations

To learn about CollegeInvest's 529 program, its objectives, risks, charges, limitations, restrictions and qualifications regarding the Plans' benefits and potential tax advantages, please read the official statement available at [www.collegeinvest.org](http://www.collegeinvest.org). Also, check with your home state to learn if it offers tax or other benefits for investing in its own plan. Administered and Issued by CollegeInvest. Contributions to the plan in a tax year are deductible from your Colorado state income tax up the extent they are included in your federal taxable income for that year, subject to recapture in subsequent years in which non-qualified withdrawals are made.