1) Account Owner
The Account Owner is 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, and Email Address.

2) Beneficiary
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
You may 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 you would like to make your contribution by mail, look on our website for your particular plan and follow those instructions on where to send your check.
If you would like to make your initial contribution electronically or want 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
That’s all you need. Congratulations, you’re on your way!

AUTOMATIC SAVINGS OPTIONS
You can elect to have automatic deposits to the account from a checking or savings account on a one time basis, or a regular monthly schedule. Or, you can elect to have regular contributions deducted from your paycheck with a Direct Deposit plan.
Forms are available on our website.