



How to Enroll

4 Steps to Open a CollegeInvest 529 Account

Enrolling is simple and takes most people less than 10 minutes. Visit collegeinvest.org, click the Enroll button in the top right corner and follow these steps:

1 Select your savings plan. You have four to choose from:

DIRECT PORTFOLIO

MOST POPULAR PLAN



A choice of aggressive to conservative investments, age-based options, individual/blended portfolios.

STABLE VALUE PLUS



Protects your principal AND guarantees a 1.79% annual rate of return for 2023 (net of fees).

SMART CHOICE



The only FDIC insured 529 savings plan that offers the Colorado state tax deduction.

SCHOLARS CHOICE



Your financial advisor will open your plan on your behalf.

2 Enter your personal information.

Account Owner

The person who will manage the account and the use of funds on behalf of the Beneficiary.

You'll need:

Full name
Social Security number
Date of birth
Mailing address

Beneficiary

The person who will use the funds for trade school or college.

You'll need:

Full name
Social Security number
Date of birth
Mailing address

Successor Account Owner

The person who will automatically assume control of the account if the Account Owner dies.

You'll need:

Full name
Social Security number
Date of birth
Mailing address

3 Provide initial contribution information.

Your bank's name
and routing number

Your checking or savings
account number

| | | |
|------------------------------------|----------------|--|
| | | 0025 |
| DATE _____ | | |
| PAY TO THE ORDER OF _____ \$ _____ | | |
| | | DOLLARS  SECURITY FEATURES INCLUDED |
| MEMO _____ | | |
| AUTHORIZED SIGNATURE _____ | | |
| ⑆ 789123456 ⑆ 123789456123 ⑆ 0025 | | |
| ROUTING NUMBER | ACCOUNT NUMBER | |

Depending on the plan you choose, you can also opt to mail your check contribution. The correct mailing address will be provided to you online.

4 Review the disclosure statements online. You'll then be directed to the appropriate Plan Manager's site to finalize your account. You will also have the ability to set up direct deposit from your paycheck at that time.