

How Employers Can Contribute to Employees' 529 Accounts

STEP 1:



Decide your Contribution Plan

Flexible and ERISA-free. Tailor it to your workforce.

STEP 2:



Enroll in the Portal

Have ready: business info, SSN/TIN, fiscal year-end month.

STEP 3:



Employees Confirm Their Account

Account must be in employee's name to qualify for the credit.

STEP 4:



Collect Account Numbers

Employees provide their CollegenInvest account number (call 800.448-2424 if needed).

STEP 5:



Record Contributions

Add employee → enter amount → select contribution method.

STEP 6:



Send Funds to CollegenInvest

Pay CollegenInvest directly; funds routed elsewhere may not be verifiable.

STEP 7:



Reporting + Filing DR 0289

Use portal to generate year-end report and claim the credit on your Colorado tax return.