

## What You'll Need to Open a Path2College 529 Plan Account



### Investments

- ✓ Review & Select Investment Options

### Account Owner Information

- ✓ First and Last Name
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Mailing Address
- ✓ Email Address
- ✓ Phone Number

### Beneficiary Information

- ✓ First and Last Name
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Mailing Address

### Contingent Account Owner Information (optional)

- ✓ First and Last Name
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Mailing Address
- ✓ Email Address
- ✓ Phone Number

### Funding Information

- ✓ Type of Account (checking or savings)
- ✓ Account Number
- ✓ Routing Number
- ✓ Name on Account
- ✓ Bank Name
- ✓ Bank Telephone Number
- ✓ Bank Online Credentials (username & password)

### To Fund Via Personal, Teller's or Cashier's Check

Make checks payable to, or endorsed to:

Path2College 529 Plan  
PO Box 55924  
Brockton, MA 02205-5924

### For Payroll Deduction

If you wish to have contributions automatically taken from your paycheck, check for program availability with your employer and then submit the proper forms by mail. Forms can be found in the Managing Your Account section of the Path2College 529 Plan website.