

What You'll Need to Open an Edvest College Savings 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

Successor 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:

Edvest College Savings Plan
PO Box 55189
Boston, MA 02205-5189

For overnight delivery, please address to:

Edvest College Savings Plan
30 Dan Road
Canton, MA 02021-2809

For Payroll Deduction

If you wish to automatically deduct contributions 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 Edvest College Savings Plan website.

Help Desk

Please call us at 1.888.338.3789 Monday-Friday, 7 AM – 7 PM CT with any questions or visit us at www.Edvest.com.