



HOW DO I GET STARTED?

To set up a ScholarShare 529 Savings Plan through CAPE payroll deduction, just follow these easy steps and start saving!

STEP 1 Call **800-544-5248** or visit **WWW.SCHOLARSHARE.COM** to request an enrollment kit.

STEP 2 **REVIEW** the enrollment kit for complete information about your Investment Options and Participation Agreement

STEP 3 **COMPLETE & SIGN** the Account Application

- Participant/Account Owner Information (that's you)
- Designated Beneficiary Information (that's who you're saving for)
- Participant Financial Profile (your investment objective)
- Investment Selection (select one of the age-based or custom investment strategies)

- Initial Funding Contribution (the initial minimum contribution is \$50.00; under the Periodic Contributions state the amount you want to contribute monthly, and select Establish Payroll Deduction and/or Direct Deposit)

- Additional Registration Types (optional)
- Name a Successor Participant/Account Owner (optional)
- Rollover (optional)
- Signature of Account Owner

STEP 4 **COMPLETE & SIGN** the College Investing Plan Direct Deposit Form

STEP 5 **MAIL** the Account Application and College Investing Plan Direct Deposit Form to the CAPE Benefits Department. **Do not mail your forms directly to ScholarShare!**

Once your forms have been received and reviewed for accuracy, CAPE will forward your enrollment to ScholarShare and begin your payroll deduction on the 15th of the following month. **Due to processing timelines, a delay of approximately 15 business days will occur each month between your payroll deduction and the deposit into your account.**

PLEASE NOTE

- The minimum monthly payroll deduction is \$15
- A \$0.50 monthly administration charge per account will be added to your total payroll deduction amount
- You must return your forms to CAPE for payroll deduction
- A separate account must be set up for each child
- You manage your account - submit any changes to your account(s) directly to ScholarShare

Specific plan information will be included in your enrollment kit

Consultants are available to answer your questions
Call **800-544-5248** or visit **WWW.SCHOLARSHARE.COM**

Payroll deduction or processing questions may be directed to the CAPE Benefits Department at 213.484.0400 x229