



# Three easy steps to open a ScholarShare 529 account

## STEP 1: WHO

You will need to know who the account owner is and who will benefit from the account.

### ACCOUNT OWNER INFORMATION

(Any individual with a valid Social Security number or federal taxpayer identification number.)

- First and last name
- Social Security or federal tax ID number
- Date of birth
- Mailing address
- Email address
- Phone number

### BENEFICIARY INFORMATION

(future student)

- First and last name
- Social Security or federal tax ID number
- Date of birth
- Mailing address

If you would like, you can include a successor account owner. Simply provide the person's first and last name, mailing address, Social Security or federal tax ID number, email address, phone number and date of birth. Please know this step is optional and can be done at any time.

## STEP 2: WHAT

You will need to choose what investment option works best for you and your beneficiary. Review the ScholarShare 529 investment options online and select one or more portfolios. Need help? Visit [ScholarShare529.com](http://ScholarShare529.com) or call 800.544.5248.

## STEP 3: HOW

You will need to select how you would like to fund your ScholarShare 529 account: through a bank account, through online bill pay or by check.

### CHECKING OR SAVINGS ACCOUNT

- Name on the account
- Account number
- Routing number
- Bank name
- Bank phone number

### ONLINE BILL PAYMENT

- Name on the account
- Account number
- Online bank username and password

### MAIL A CHECK

If funding via a personal, teller's or cashier's check, make the check payable or endorsed to:  
ScholarShare 529  
College Savings Plan  
PO Box 219185  
Kansas City, MO 64121-9185



800.544.5248  
[scholarshare@treasurer.ca.gov](mailto:scholarshare@treasurer.ca.gov)  
[ScholarShare529.com/mgp](http://ScholarShare529.com/mgp)

To learn more about the California 529 College Savings Plan, its investment objectives, tax benefits, risks, and costs, please see the Disclosure Booklet at [ScholarShare529.com](http://ScholarShare529.com). Read it carefully. Check with your home state to learn if it offers tax or other benefits such as financial aid, scholarship funds or protection from creditors for investing in its own 529 plan. Consult your legal or tax professional for tax advice, including the impact of the new federal tax changes. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss. If the funds aren't used for qualified education expenses, a 10% penalty tax on earnings (as well as federal and state income taxes) may apply. Non-qualified withdrawals may also be subject to an additional 2.5% California tax on earnings. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA and SIPC, distributor and underwriter for the California 529 College Savings Plan. 707822