Upromise Rewards Service
This free service lets you earn college savings on eligible everyday purchases when you shop online, dine out, and much more. The extra money from your Upromise rewards service account can add up over time when it's automatically transferred to your Upromise College Fund 529 Plan account on a periodic basis.

ugift

ugift is an easy online feature that allows you to invite family and friends to celebrate occasions (birthdays, holidays, graduations) with gift contributions to your Upromise College Fund 529 Plan account. This can be one of the most meaningful gifts your child ever receives — help toward a college education.

Learn more about these programs at nevadas529.com
open a 529 account

Visit nevadasavings.com and click on the "Open a 529 plan" button to learn more about the Nevada College Fund 529 plan to offer to your child.

Set aside money now.

Avoiding paying for college tuition later—see how much college tuition and fees are expected to go up by the time your child is ready to go to college—can also help you save money for your student's higher education.

See the benefits:

1. Nevada residents
2. Non-Nevada residents
3. Non-resident, out-of-state

You can enroll and manage your account online—easily with the comfort of knowing that you are not paying for college tuition later. This program is designed to help you save money for your student's higher education. This is an investment program designed to help you save money for your student's higher education.

Silver State Matching Grant Program:

To enroll in the program, you must open a Nevada 529 plan and link the plan to your account. For more information, please visit nevadasavings.com.

529 Plan Benefits

- College savings
- Tax advantages
- Long-term investment
- Easy enrollment
- Flexibility
- No investment fees
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits
- No investment minimum
- No early withdrawal penalties
- No penalty for withdrawals
- No investment limits

Nevada State Education Savings Program

Designed specifically for your grandchildren, or even for your grandchildren's grandchildren. This is an investment program designed to help you save money for your grandchild's higher education. This program is designed to help you save money for your grandchild's higher education.
my goals

I want to be [a(n)] ________________________

I could make $_________ per year

It will take _____ years of school

What I can do to reach my goal:
1. 
2. 
3. 

I will save for my college education by doing these things:
1. 
2. 
3. 

Now go talk to your family and share your plan!

---

don't forget—college costs money!

In 2010, tuition and fees at a...
2-year public school cost $2,544 per year.
4-year public school (in-state) cost $7,020 per year.
4-year private school cost $28,273 per year.

(The College Board, Trends in College Pricing, 2009)
Introducing a new investment option for Upromise College Fund 529 Plan Account Owners.

The Savings Portfolio:

Are you looking for a conservative investment option for your college savings? If so, you might be interested in the new Savings Portfolio. It's a lower-risk, Federal Deposit Insurance Corporation (FDIC)-insured option.

- **Investment objective:** The Portfolio seeks income consistent with the preservation of principal.

- **Investment strategy:** The Portfolio invests 100% of its assets in the Sallie Mae High-Yield Savings Account (HYSA). The HYSA is held in an omnibus savings account, insured by the FDIC, which is held in trust by the Board of Trustees of the College Savings Plans of Nevada at Sallie Mae Bank.

- **Low fees:**
  - The Annual Asset-Based Fee for the Savings Portfolio is 0.23%.
  - The Plan's $20 Annual Account Maintenance Fee is waived for account owners who are invested in the Savings Portfolio at the time the Annual Account Maintenance Fee is assessed.

For more information on the Savings Portfolio, please refer to the Plan Description and Participation Agreement or visit upromisecollegefund.com.
For more information about the Upromise College Fund 529 Plan call 1-800-587-7305 or visit www.upromisecollegefund.com to obtain a Plan Description and Participation Agreement. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing. Upromise Investments, Inc., Distributor and Underwriter.

If you are not a Nevada taxpayer, consider before investing whether your or the designated beneficiary's home state offers any state tax or other benefits that are only available for investments in such state's qualified tuition program.

The Upromise College Fund 529 Plan (Plan) is administered by the Board of Trustees of the College Savings Plans of Nevada (Board), chaired by the Nevada State Treasurer Kate Marshall. Upromise Investments, Inc. (Ull) serves as the Program Manager. Ull has overall responsibility for the day-to-day operations, including marketing and distribution of the Plan. The Vanguard Group, Inc. serves as Investment Manager for the Plan except for the Savings Portfolio, which is managed by Sallie Mae Bank. The Plan's Portfolios invest in either (i) mutual funds offered or managed by Vanguard; or (ii) a Federal Deposit Insurance Corporation (FDIC)-insured omnibus savings account held in trust by the Board at Sallie Mae Bank. Upromise, Inc., Ull and Sallie Mae Bank are affiliates. Except for the Savings Portfolio, investments in the Plan are not insured by the FDIC. Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns will vary depending upon the performance of the Portfolios you choose. Except to the extent of FDIC insurance available for the Savings Portfolio, you could lose all or a portion of your money by investing in the Plan, depending on market conditions. Account Owners assume all investment risks as well as responsibility for any federal and state tax consequences.

Upromise and the Upromise logo are registered service marks of Upromise, Inc.
How it works.
Upromise is free to join. Once you become a member and make eligible purchases with our partners, you’ll automatically receive money in your Upromise account.

Here are a few of the companies you can save with.

750+ online retail and travel web sites including:

Target.com  Expedia  AVIS

30,000+ grocery and drug stores, and thousands of participating items including:

CVS/pharmacy  Hefty  Nestlé

15,000+ retail service and restaurant locations including:

EXON  Mobil

I'm lovin' it

Specific terms and conditions apply for each company’s contributions. Participating companies, contribution levels and terms and conditions are subject to change without notice. Go to upromise.com to learn more.

Upromise and the Upromise logo are registered service marks of Upromise, Inc. © 2010 Upromise, Inc. Other logos are trademarks or service marks of their respective owners.
Here's where you can earn:

- 750+ online stores
- 30,000+ grocery and drugstores
- 45,000+ retail, service and restaurant locations

Upromise savings example

<table>
<thead>
<tr>
<th>Company</th>
<th>Savings</th>
<th>Savings</th>
<th>Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>bedbathandbeyond.com</td>
<td>$50</td>
<td>2%</td>
<td>$1.00</td>
</tr>
<tr>
<td>Upromise Dining Restaurant</td>
<td>$60</td>
<td>8%**</td>
<td>$4.80</td>
</tr>
<tr>
<td>Expedia.com</td>
<td>$300</td>
<td>1%</td>
<td>$3.00</td>
</tr>
<tr>
<td>BestBuy.com</td>
<td>$60</td>
<td>2%</td>
<td>$1.20</td>
</tr>
<tr>
<td>1-800-FLOWERS.COM®</td>
<td>$40</td>
<td>10%</td>
<td>$4.00</td>
</tr>
<tr>
<td>Sears.com</td>
<td>$75</td>
<td>2%</td>
<td>$1.50</td>
</tr>
<tr>
<td>Gap.com</td>
<td>$150</td>
<td>5%</td>
<td>$9.00</td>
</tr>
</tbody>
</table>

YOUR TOTAL EARNINGS: $24.60

* Restrictions apply. Please see Upromise site for details.
** The Upromise Dining program offers Preferred Diners 4%-8% contributions on eligible transactions, while the standard offering is only 2%-4%.

For illustrative purposes only. Actual savings depend on your eligible spending. Example assumes purchases made in accordance with partner contribution requirements.

Join today at: upromise.com

Frequently asked questions

Q: What does it cost to join Upromise?
A: Upromise is free to join.

Q: Where does the money I get come from?
A: The money you get back on your spending comes from Upromise's partners – not out of your pocket.

Q: Who are Upromise's partners?
A: Hundreds of America's leading companies – like eBay, Expedia, LLBean.com, Apple.com, Target.com, over 30,000 restaurant locations; and hundreds of stores and service providers.

Q: Why are they willing to put money into my Upromise account?
A: Two reasons: They value higher education and they want your loyalty as a customer.

Q: Do I need a Upromise credit card to be a member?
A: Absolutely not. But using one will help you earn money for college even faster.

Q: Do I need to have a college savings account (like a 529) to join Upromise?
A: No. A college savings account isn't necessary to reap the benefits of Upromise or to be a member, but we do offer 529 college savings accounts with automatic transfers.

Q: I don't know much about Upromise. Is it new?
A: Upromise began in 2001 and since then has helped members save over half a billion dollars for college.

Q: How do I start saving money for college through Upromise?
A: (1) Go to www.upromise.com/brochure and click the join button.
(2) Sign-up for as many savings programs as you want (i.e., grocery, dining, credit card), and then continue to do the things you normally do but choose to do so with Upromise partners whenever possible.
(3) Your earnings will be sent to your Upromise account automatically.
(4) Open a 529 account and your Upromise savings can be automatically transferred on a periodic basis.

"Chloe's college savings account grows when we purchase diapers, baby food and more. Best of all, we've set it so the savings automatically transfer to her 529 plan."

Upromise can help you pay for college.

Upromise is a major private source of college funding in America. Our service can help you get money for college, whether you're saving for a child's future education or paying down a student loan. To date, our members have received over half a billion dollars from our program.

Hundreds of companies give money for college.

As a Upromise member, you can get money back for college by simply doing the things you do every day – shopping online, buying groceries, filling your gas tank, eating out, booking travel, and much more.

The money you receive comes from our partners, well-known companies (see back of brochure) who want your customer loyalty and who value higher education.

"I'm so glad my parents started a Upromise account when I was young. It definitely helped pay for this semester's tuition."
Save for college with every celebration

Try Light for yourself at upromisecollegefund.com

What are you waiting for?
- Print out a gift certificate to present to the beneficiary.
- Send a cheque (minimum of $25) with the gift contribution.
- Mail a cheque (minimum of $25) with the gift contribution.
- Fill in the details of the celebration and create a list of
  names and email addresses for your friends and family.
- Fill in the details of the celebration and create a list of
  names and email addresses for your friends and family.
- Log on to your account at upromisecollegefund.com.
- Click on the Light link.

Here's how to build college savings with Light:

1. They send a gift invitation.
2. They send a gift invitation.
3. They send a gift invitation.

A free service from the

Upromise College Fund 529 Plan

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.

Family and friends who want to give the gift of education,

used Light. They've seen first-hand the generosity of

Thousands of families around the country have already

Save for college with every celebration.
For more information about the Upromise College Fund 529 Plan call 1-800-587-7305 or visit www.upromisecollegefund.com to obtain a Plan Description and Participation Agreement. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing. Upromise Investments, Inc., Distributor and Underwriter.

If you are not a Nevada taxpayer, consider before investing whether your or the designated beneficiary’s home state offers any state tax or other benefits that are only available for investments in such state’s qualified tuition program.

The Upromise College Fund 529 Plan (Plan) is administered by the Board of Trustees of the College Savings Plans of Nevada (Board), chaired by the Nevada State Treasurer Kate Marshall. Upromise Investments, Inc. (UII) serves as the Program Manager. UII has overall responsibility for the day-to-day operations, including marketing and distribution of the Plan. The Vanguard Group, Inc. serves as Investment Manager for the Plan except for the Savings Portfolio, which is managed by Sallie Mae Bank. The Plan’s Portfolios invest in either (i) mutual funds offered or managed by Vanguard; or (ii) a Federal Deposit Insurance Corporation (FDIC) insured omnibus savings account held in trust by the Board at Sallie Mae Bank. Upromise, Inc., UII and Sallie Mae Bank are affiliates. Except for the Savings Portfolio, investments in the Plan are not insured by the FDIC. Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns will vary depending upon the performance of the Portfolios you choose. Except to the extent of FDIC insurance available for the Savings Portfolio, you could lose all or a portion of your money by investing in the Plan, depending on market conditions. Account Owners assume all investment risks as well as responsibility for any federal and state tax consequences.

Ugift is a registered service mark of Upromise, Inc. All other marks are the property of their respective owners.

UCF6133B 1010
Silver State Matching Grant Program
Frequently Asked Questions

Full Program information and an application form are available at upromisecollegefund.com/match.

Applying for the Silver State Matching Grant Program

What is the Silver State Matching Grant Program?

The State of Nevada and the Upromise College Fund 529 Plan have joined forces to help Nevada families get a jumpstart on their college savings. Residents who qualify can receive matching funds of up to $300 per calendar year. The lifetime maximum grant total is $1,500.

How does a person qualify?

**Applicant:**
- Must be the account owner of a Upromise College Fund 529 Plan account
- Must be a Nevada resident
- Cannot be both account owner and beneficiary

**Student:**
- Must be the named beneficiary of a Upromise College Fund 529 Plan account
- Must be age 13 or younger when the first matching grant application is approved
- Must be a Nevada resident
- Cannot have more than one matching grant account

Are there income restrictions?

The applicant’s household Adjusted Gross Income (AGI) must be $61,950 or less.

When are applications accepted?

- Applications are accepted between March 1 and June 30 each year.
- The State will notify applicants in writing by the end of August on the status of their application.

How does the match work?

Approved applicants will be matched based on the following:

<table>
<thead>
<tr>
<th>Household Adjusted Gross Income</th>
<th>Match Rate</th>
<th>Minimum Annual Contribution for Maximum Match</th>
<th>Maximum Annual Matching Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0 to $41,300</td>
<td>$1 for each $1 contributed</td>
<td>$300</td>
<td>$300</td>
</tr>
<tr>
<td>$41,301 to $61,950</td>
<td>$1 for each $2 contributed</td>
<td>$600</td>
<td>$300</td>
</tr>
</tbody>
</table>

- Matching grant contributions will be deposited into a matching grant account in January for contributions made the previous calendar year.

Where can the application form be found?

- The Silver State Matching Grant Program Application can be downloaded at upromisecollegefund.com/match. Information is also available on the Treasurer’s website, https://nevadatreasurer.gov/index.htm.

What do I need to submit with my application?

If you are not already a Upromise College Fund 529 Plan account owner, you must open an account in order to apply. You will also need:
- A completed Silver State Matching Grant Program Application
- The portion of your federal income tax return (for the previous year) that shows your household adjusted gross income (for both the account owner and spouse) and address. (For example, if applying in March of 2010, you must enclose the required portion of your completed 2009 federal tax return.)
- A completed Form 4506T-EZ, for verification with the IRS that the tax return has been filed
After you have received a matching grant

How are the matching grant funds invested?
The funds will be invested according to the allocation instructions on file for your Upromise College Fund 529 Plan account at the time the funds are deposited into the matching grant account.

How do I view my matching grant account?
After you have been approved for a matching grant, you can access your linked matching grant account via the Account Overview page on upromisecollegefund.com.

Are there withdrawal restrictions?
- Distributions from matching grant accounts must be sent directly to an Eligible Educational Institution.
- Distributions cannot be made payable or sent directly to you or to your beneficiary.
- If you request a qualified withdrawal other than to an Eligible Educational Institution, the distribution will be taken only from your Upromise College Fund 529 Plan account.

How do I withdraw matching grant funds?
- Online at upromisecollegefund.com
- By mailing a withdrawal request form to the Plan

Two checks will be produced for qualified withdrawals – one check from your matching grant account and one check from your Upromise College Fund 529 Plan account.

Under what circumstances will the matching funds be forfeited?
- A non-qualified withdrawal, if it brings your Upromise College Fund 529 Plan account balance below your matching grant account’s balance
- A rollover from your Upromise College Fund 529 Plan account to another state’s 529 plan
- A change of beneficiary if: 1) the new beneficiary already has received a matching grant; or 2) the new beneficiary is not a member of the family
- The death of the beneficiary (unless you change the beneficiary to a member of the family) as defined in the Plan Description and Participation Agreement
- A beneficiary's disability, if they are unable to attend school (you can change the beneficiary to a member of the family
- Account closure

Note: You will have 18 months to replenish your Upromise College Fund 529 Plan account in order to prevent forfeiture of your matching grant account funds.

If you have additional questions about either the Upromise College Fund 529 Plan or the Silver State Matching Grant Program, call 1.800.587.7305, M-F from 8:00 a.m. to 8:00 p.m. ET, or visit upromisecollegefund.com.
**fact or fiction**

**fiction:** A 529 plan can only be used at schools in your home state

**fact:** You can use the assets at any eligible school around the country and abroad — not just in Nevada. That includes 2- and 4-year colleges, graduate schools (including law and medical), and vocational/technical schools.¹

**fiction:** You can only use 529 plans to pay for tuition

**fact:** You can use your account assets for many higher education expenses, including tuition, fees, certain room and board costs, and for 2010, computers and course-related software.²

**fiction:** It costs a lot to open and maintain an account

**fact:** Most plans have low minimums. You can open a Upromise College Fund 529 Plan account for only $50 per month with an Automatic Investment Plan or $15 per paycheck with payroll direct deposit.³ To help families save more, the Upromise College Fund 529 Plan offers additional features: The Silver State Matching Grant Program; Ugift® — Give College Savings, which allows account owners to invite family and friends to make gift contributions; and Upromise® rewards, a service that lets account owners earn college savings when they shop online, dine out, and more.⁴

**fiction:** You have to make a lot of investment decisions

**fact:** 529 plans have several investment types to meet your needs. The Upromise College Fund 529 Plan offers two types of investments. Three Age-Based Options offer “set it and forget it” portfolios that get more conservative as the beneficiary gets closer to college age. There are eight Custom portfolios that let you create your own investment strategy. If you prefer, you can also combine the two options.

**fiction:** It's too late to start a 529 plan

**fact:** It's never too late. Even if your student is in high school you can benefit from a 529 plan. Earnings grow tax deferred in a Upromise College Fund 529 Plan, and when you withdraw the money for a qualified expense, it's federal tax free.⁵ Any assets not used can be rolled over to another family member (as per Plan rules).

---

¹ An eligible institution is one that can participate in federal financial aid programs.

² Earnings on non-qualified withdrawals are subject to federal income tax and may be subject to a 10% federal penalty tax, as well as state and local income taxes. The availability of tax or other benefits may be contingent on meeting other requirements.

³ A plan of regular investment cannot assure a profit or protect against loss in a declining market.

⁴ Upromise is an optional service offered by Upromise, Inc., is separate from the Upromise College Fund, and is not affiliated with the State of Nevada. Specific terms and conditions apply. Participating companies, contribution levels and conditions subject to change without notice. Transfers subject to a $25 minimum. Upromise, Inc. is affiliated with Upromise Investments, Inc.
fiction: I make too much money for a 529 plan account.

fact: There are no income limitations for a 529 plan. In fact, as part of the tax advantages offered by a 529 plan, account owners can contribute $13,000 ($26,000 if married, filing jointly) in a single year without incurring a gift tax.

fiction: A 529 plan is only for kids.

fact: Are you considering career retraining or an advanced degree? There’s no maximum age for a 529 plan. As long as your school is eligible, you can use your 529 plan assets — even if you’re not attending full-time.

fiction: If the child doesn’t go to college, you lose your money.

fact: Unlike other college savings options, a 529 plan account owner controls the account. That means you can change your beneficiary to another eligible “member of the family” (as per Plan rules) with no tax penalty.¹

fiction: Only a parent can be an account owner.

fact: Parents, grandparents, aunts, uncles, friends...almost anyone can be an account owner.⁰ You can also open an account for your own education.

fiction: It’s difficult to open up a 529 plan account.

fact: Most 529 plans let you open an account online. You can open a Upromise College Fund 529 Plan account at nevadas529.com.

¹ You should consult with a tax advisor when considering a change of beneficiary.

⁰ You must be a U.S. citizen or resident alien, have a Social Security number or Tax Identification number, and have a permanent U.S. address (not a P.O. Box).

For more information about the Upromise College Fund 529 Plan call 1-877-486-9251 or visit www.nevadas529.com to obtain a Plan Description and Participation Agreement. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing. Upromise Investments, Inc., Distributor and Underwriter.

If you are not a Nevada taxpayer, consider before investing whether your or the designated beneficiary’s home state offers any state tax or other benefits that are only available for investments in such state’s qualified tuition program.

The Upromise College Fund 529 Plan is administered by the Board of Trustees of the College Savings Plans of Nevada, chaired by Nevada State Treasurer Kate Marshall. Upromise Investments, Inc., serves as the Program Manager and has overall responsibility for the day-to-day operations, including marketing and distributing the Plan. The Vanguard Group, Inc., serves as Investment Manager. The value of an investment in the Upromise College Fund 529 Plan will vary with market conditions. Investments in the 529 Plan are not FDIC-insured or government guaranteed, and you could lose money. Investing regularly does not assure a profit and does not protect against loss in declining markets.

Upromise and Ugift are registered service marks of Upromise, Inc.
ONLINE ENROLLMENT:
Step 1
Follow the online enrollment instructions at nevadas529.com and select “Payroll Deduction” under the “Funding Your Account” section of the online enrollment process.

Step 2
Enter the payroll direct deposit information and print out the Payroll Deduction Authorization Form during online enrollment. This form will be pre-filled with the account owner’s name, the total payroll direct deposit amount, your unique account number, and the routing (ABA) number for the Plan’s bank.

If you are funding more than one account by payroll direct deposit, the amount deducted per pay period should be the sum of all your payroll contributions.

Step 3
Submit the Payroll Deduction Authorization Form to the appropriate Human Resources, Benefits, or Payroll department.

Step 4
The appropriate department will update the payroll direct deposit amount in the payroll system and begin the process of sending contributions to the Plan.

PAPER-BASED ENROLLMENT:
Step 1
Download an enrollment kit at nevadas529.com, or call the Plan toll-free at 1.877.486.9251 to receive one by mail.

Step 2
Complete the Enrollment Form and select “Payroll Deduction” as the method of funding the account in the “Initial Contribution Method” section of the form.

Step 3
Mail the completed Enrollment Form to Upromise College Fund 529 Plan, Upromise Investments Service Center, P.O. Box 55578, Boston, MA 02205-5578.

Step 4
Once the Enrollment Form is processed, you will be mailed a Payroll Deduction Authorization Form. This form will be pre-filled with the account owner’s name, the total payroll direct deposit amount, your unique account number, and the routing (ABA) number for the Plan’s bank.

If you are funding more than one account by payroll direct deposit, the amount deducted per pay period should be the sum of all your payroll contributions.

Step 5
Submit the Payroll Deduction Authorization Form to the appropriate Human Resources, Benefits, or Payroll department.

Step 6
The appropriate department will update the payroll direct deposit amount in the payroll system and begin the process of sending contributions to the Plan.
Payroll Deduction Authorization Form

Step 1. (FOR EMPLOYEES): Complete this form and return to your employer
Please print this page, sign it, include your Social Security number and the date, and submit it to the HR, benefits, or payroll representative responsible for administering payroll deduction contributions to the Program. Your employer will initiate or change your payroll deduction after they receive this form.

Employee Name: Sample Employee
Total amount to be deducted per pay period: $0.00

Employee Signature
Employee SSN
Date

Step 2. (FOR EMPLOYERS): Establish Payroll Deduction Instructions on Your Payroll System
When updating ACH direct deposit instructions for this employee, please make sure that you provide the following information with your transmittal:

1. ABA Number
2. Account Number
3. Code Transmittal for Checking

Note: The account number is a 12-digit field. The first 3 digits identify the bank account of Upromise College Fund 529 Plan. The last 9 digits are the first nine digits of the employee's Upromise College Fund 529 Plan account number.

For Employers Transmitting Funds by Check
If you are submitting payroll deduction contributions by check, please mail the check to the appropriate address below, along with a corresponding list containing the name, account number, and contribution amount for each participating employee:

By U.S. mail:
Upromise College Fund 529 Plan
Upromise Investments Service Center
P.O. Box 55578
Boston, MA 02205-5578

By registered, certified or overnight mail:
Upromise College Fund 529 Plan
Upromise Investments Service Center
95 Wells Avenue, Suite 155
Newton, MA 02459

If you have any questions, please call customer service at 1-800-587-7305 on business days, between 8 a.m. and 8 p.m., Eastern Standard Time (EST).

More ways to save: Ugift® — Give College Savings and Upromise
Ugift allows you to invite family and friends to celebrate occasions with gift contributions to your Upromise College Fund 529 Plan account. For information, log on to your account and click on the Ugift link.

Upromise® is a free service designed to help families save more for college. You can earn college savings on eligible everyday purchases when you shop online, dine out, and much more. The extra money from your Upromise account can add up over time when it's automatically transferred to your Upromise College Fund 529 Plan account on a periodic basis. To learn more, visit nevadas529.com and click on the Upromise logo.

* Upromise is an optional service offered by Upromise, Inc., is separate from the Upromise College Fund 529 Plan, and is not affiliated with the State of Nevada. Specific terms and conditions apply. Participating companies, contribution levels and conditions subject to change without notice. Transfers subject to a $25 minimum. Upromise, Inc. is affiliated with Upromise Investments, Inc.

For more information about the Upromise College Fund 529 Plan call 1-877-486-9251 or visit www.nevadas529.com to obtain a Plan Description and Participation Agreement. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing. Upromise Investments, Inc., Distributor and Underwriter.

If you are not a Nevada taxpayer, consider before investing whether your or the designated beneficiary's home state offers any state tax or other benefits that are only available for investments in such state's qualified tuition program.

The Upromise College Fund 529 Plan is administered by the Board of Trustees of the College Savings Plans of Nevada, chaired by Nevada State Treasurer Kate Marshall. Upromise Investments, Inc., serves as the Program Manager and has overall responsibility for the day-to-day operations, including marketing and distributing the Plan. The Vanguard Group, Inc., serves as Investment Manager. The value of an investment in the Upromise College Fund 529 Plan will vary with market conditions. Investments in the 529 Plan are not FDIC-insured or government guaranteed, and you could lose money. Investing regularly does not assure a profit and does not protect against loss in declining markets.

ECI:02BD EMP 0310