ENDOWMENT
WEALTH MANAGEMENT®
Fee-Only Fiduciary Advisors

EWM Personal Finance Tips & Solutions

Edvest 529 College Savings Plan

Problem: How to Fund Future Education Expenses Tax Free?

Solution: Open a Wisconsin Edvest 529 Saving Plan Account

Benefits: Tax free growth and Legacy planning

Steps to take:

1. Click the green "Open An Account" button at www.Edvest.com.
2. Enter your information and click Continue.
3. Click "Continue Enrollment".
4. Click Individual Account.
5. Enter Address Information & click Continue.
6. Enter Social Security #, Birth Date, and Gender, and click Continue.
7. Enter beneficiary (student/child) information and click Continue. (Start with one child)
8. Add a successor for the account (your spouse or child parent) and click Continue.
9. Click Year of Enrollment Options and select expected enrollment year and click Continue.
10. Select how you want to fund the account. The most common is Bank Account, either one time or recurring. If you want recurring, click the check box which says, "Make contribution recurring" and click Continue.
11. If you are opening more than one account (for multiple children), click "Yes, Add Another Beneficiary", otherwise click "No, let's finish up".
12. Add a username and security questions to your account.

(continued on the other side)

13. If you would like to allow friends and family to gift money, click “Activate Ugift Code” and click Continue.

14. Decide how you would like to receive communications, check the box “I agree..” and click Continue.

15. Review, check box and click “Sign”.

Instead of clicking the “Print” button, we recommend printing the entire webpage by right clicking and hit Print. That way you have the entire page which contains the code which can be used by friends and family at www.ugift529.com, entering the code and making a gift.

LAST STEP!! Print off the attached authorization form here and fill in Section 1 with your account owner information and be sure to write in the new account number(s). Sign on the final page and mail this form back to Endowment Wealth Management (W6272 Communication Ct., Appleton, WI 54914) so we can complete and submit.

There is NO Charge for us to be the ‘advisor’ on this account and assist you if you ever need help

To learn more about Endowment Wealth Management and our Fee-Only Fiduciary Advice:

Call: (920) 785-6010
Visit: www.EndowmentWM.com

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