



**STEP BY STEP INSTRUCTIONS for signing up for a CollegeChoice 529 Direct account. Visit <https://www.collegechoicedirect.com/indtpl/uii529enroll/gettingStarted.do>.**

**1. About you (Account Owner)**

- a. Personal Information – address, phone, email, date of birth and Social Security or Individual Taxpayer Identification Number.
- b. Successor Account Owner – another adult (spouse, etc.) and their date of birth.

**2. About your Beneficiary (Your Child)**

- a. You need your child's date of birth, social security number and address.
- b. Savings Goal(s) - Select one category

**3. Choose Investments**

We are not Financial Advisors. Some people put 100% in the graduation year closest to their child's graduation year. Others split the money into more than one investment. If you choose this second option, be sure that your total investment totals 100%.

**4. Pick a funding method**

Pick one method to fund your account

**5. Select a delivery method.**

Choose email or US mail for all three categories.

**6. Complete your account**

- a. Create a username and password.
- b. Choose security questions and answer those questions.
- c. Choose a security image.
- d. PIN – Decide whether you want to use a PIN when you sign in.

**7. Write down your Ugift Code**

**8. Go to <https://www.randolphcountyfoundation.org/promise/> and complete the online information form or complete the information form attached and return it to the school.**

**\*Contact Promise Coordinator with any questions you may have. (765-584-9077 Ext 204)**