



Open An Account

Personal info needed for the application

You:

- Preferred phone number
- Address
- Date of birth
- Social Security number*
- Driver's license number or state ID and exp date
- Mother's maiden name

The successor:

- Phone number
- Address
- Date of birth
- Social Security number*

The beneficiary:

- Phone number
- Address
- Date of birth
- Social Security number*

Bank account for electronic transfers to/from your 529

Plan:

- Account number
- Routing number and/or blank check

IMPORTANT INFORMATION ABOUT OPENING A NEW ACCOUNT. We are required by federal law to obtain from each person who opens an account certain personal information — including name, street address, date of birth, and Social Security number/Taxpayer Identification Number among other information — that will be used to verify your identity. If you do not provide us with this information, we will not be able to open your account. If we are unable to verify your identity, we reserve the right to close your account or take other steps we deem reasonable.



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