

# Setting up Payroll Direct Deposit for Contributions into an Edvest 529 Account

## Step 1: Allocate your direct deposit amount on Edvest.com.

Log into your account at Edvest.com. Go to the “Profile & Documents” section on the home screen and select “Payroll Direct Deposit,” then “Change Payroll Instructions.” Enter the dollar amount per paycheck (and per beneficiary if you have more than one account to be contributed per paycheck). Select “Next.” View or print the payroll direct deposit instructions by selecting “Get Form.”

## Step 2: Inform your employer how much you'd like sent to Edvest 529 each pay period.

Follow the payroll direct deposit instructions you printed or viewed in Step 1. Input the routing instructions into your employer's self-service portal. If your employer does not offer a self-service portal, provide the printed and completed form to your payroll office.

**IMPORTANT:** If you are funding more than one Edvest 529 account through payroll direct deposit, only add ONE payroll deduction in the TOTAL amount of all Edvest 529 account contributions for each pay period.

*Example: You have two Edvest 529 accounts that you indicated in Step 1 will each receive \$25 per paycheck. In your employer's self-service portal, or via your payroll direct deposit instructions form, list one deduction in the amount of \$50. Your first contribution may take up to 1-3 pay periods.*

### Direct deposit routing instructions (for your employer):

**Account Type:** Checking

**ABA Number:** 011001234

**Account Number:**

584 + first 9 digits of Edvest 529 account number



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