



# ALASKA529


## QUICK START GUIDE


**Congratulations!** You've taken the first step toward saving for your child's education. Use this checklist to guide you through the process of opening an Alaska 529 account. If you have any questions along the way, please call an Education Savings Specialist at 1-866-277-1005.


 Determine who will serve as the account holder and beneficiary of record for the Alaska 529 account. Consider adding a successor account holder to take over the account in the event of unforeseen circumstances.


 Gather account holder and beneficiary information including:

<input type="checkbox"/> Name	<input type="checkbox"/> Residential Street Address
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Bank Routing Number*
<input type="checkbox"/> Social Security Number	<input type="checkbox"/> Bank Account Number*

 Research the **investment options** and choose one or more for an investment strategy that works best for you. ([alaska529plan.com/investment-options](http://alaska529plan.com/investment-options))

 Wondering how much you will need to save? Use the **College Savings Planner** to help you set a goal. ([alaska529plan.com/college-savings-planner](http://alaska529plan.com/college-savings-planner))

 Decide how you will provide funding for the account. You can **invest a PFD**, make an initial contribution, or make a recurring contribution through Automatic Monthly Contributions (AMC) or payroll direct deposit. The minimum contribution to get started is \$25. ([alaska529plan.com/save-a-pfd](http://alaska529plan.com/save-a-pfd))

 **OPEN AN ACCOUNT**

- **Online** at [alaska529plan.com/getstarted](http://alaska529plan.com/getstarted); or
- **Download an Enrollment Kit.** You'll receive a packet with everything you need to open an account; or
- Answer "Yes" to the Alaska 529 question on your PFD application. You can designate half of your PFD, half of your child's PFD, or half of both to be directly invested in the plan; or
- Call an Education Savings Specialist at 1-866-277-1005. We'll be glad to help you with whatever you need.

*\* Not required for both parties and optional at the time of account setup.*

*If you are not an Alaska resident, you should compare this Plan with any 529 plan offered by your home state or your beneficiary's home state and consider, before investing, any state tax or other state benefits, such as financial aid, scholarship funds, and protection from creditors that are only available for investments in the home state's plan. Please read and/or download the **Plan Disclosure Document**, which includes investment objectives, risks, fees, charges and expenses, and other information that you should read and consider carefully before investing, or call 1-866-277-1005 to request a paper copy. T. Rowe Price Investment Services, Inc., Distributor/Underwriter.*