Bright Start Direct-Sold College Savings Program

Payroll Direct Deposit Form

BrightStart529 College Savings

- The employee must be the Account Owner or the Custodian for a Minor.
- If you're updating your payroll contribution per pay period, please update through your employer's payroll department or online self-service portal if available.
- If you're changing the amount per beneficiary account, please login to your Account at **www.BrightStart.com** to update.
- After this form is processed, you will receive a **Payroll Direct Deposit Confirmation Form,** which you must sign and submit to your employer's payroll department or if your employer offers a self-service portal to set-up payroll direct deposit, you do not need to submit this confirmation to your employer, instead follow the routing instructions provided and enter into the portal. Your payroll direct deposit instructions will not take effect until your employer has processed your signed form or submitted your request through the self-service portal.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.
- For faster processing, you can complete this request and receive your confirmation with instructions online at **www.BrightStart.com**.

1-877-432-7444
Monday to Friday 7 a.m. - 7 p.m. CT

www.BrightStart.com

Regular mailing address:
Bright Start Direct-Sold College Savings Program
PO Box 219288
Kansas City, MO 64121-9288

Overnight mailing address:
Bright Start Direct-Sold College Savings Program
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131

To request assistance in completing this form call us at **1-877-432-7444** Monday to Friday 7 a.m. - 7 p.m CT.

1. Account Owner Information

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Account Number

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Account Owner *(First name)* *(M.I.)*

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Account Owner *(Last name)*

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Telephone Number *(In case we have a question about your Account.)*

* I L P A Y R O L L *

2. Employee Information

Employee Name *(First name)* *(M.I.)*

Employee Name *(Last name)*

Social Security Number or Individual Tax Identification Number

Employee ID Number *(if required by your employer)*

Employee Email Address

Name of Employer

Employer Address

Employer City

State

Zip Code

Payroll Department Contact Name

Telephone Number

Extension *(if any)*

3. Payroll Direct Deposit Instructions

Check one: ☐ Start Payroll Direct Deposits ☐ Change Amount ☐ Stop Payroll Direct Deposits *(Skip to **Section 4**)*

Deduct $,. 0 0 from my paycheck (on an after-tax basis) each pay period and allocate the amount among my **Bright Start Direct-Sold College Savings Program** Accounts as detailed below.

Please use an additional sheet if you have more than four Accounts.

Account Number

$,. 0 0
Dollar Amount

Beneficiary *(First name)* *(M.I.)*

Beneficiary *(Last name)*

Account Number

$,. 0 0
Dollar Amount

Beneficiary *(First name)* *(M.I.)*

Beneficiary *(Last name)*

Account Number — $ Dollar Amount

Beneficiary *(First name)* *(M.I.)*

Beneficiary *(Last name)*

Account Number — $ Dollar Amount

Beneficiary *(First name)* *(M.I.)*

Beneficiary *(Last name)*

4. Employee (Account Owner) Signature — YOU MUST SIGN BELOW

By signing below, I authorize my employer to remit Payroll Direct Deposits to the above-stated Bright Start Direct-Sold College Savings Program Account(s).

I certify that I have read and understand, consent, and agree to all the terms and conditions of the Bright Start Direct-Sold College Savings Program Plan Description and Participation Agreement and understand the rules and regulations governing the **Bright Start Direct-Sold College Savings Program**. Further, I understand that none of the Bright Start Direct-Sold College Savings Program, the State of Illinois, the Office of the Illinois State Treasurer, TIAA-CREF Tuition Financing, Inc., Ascensus College Savings Recordkeeping Services, LLC and its affiliates are responsible for any claims I may make and/or losses resulting from my employer's failure to timely and accurately process my contributions via payroll direct deposit. This authorization will remain in effect until cancelled by me or by Bright Start Direct-Sold College Savings Program, or upon termination of my employment.

SIGNATURE

Signature of Account Owner — Date *(mm-dd-yyyy)*

Employee Checklist

- Be sure to include your account number(s) for **each** Beneficiary listed on this form in **Section 3**.
- Your Direct Deposit form will be rejected by Bright Start Direct-Sold College Savings Program in its entirety if your allocation for each Beneficiary does not equal 100%.
- Complete your payroll direct deposit set-up through your employer's self-service portal or give a copy of the payroll direct deposit confirmation to your employer.
- Mail the original copy of this form to the Plan. It may take up to 10 days from the receipt of this form before a payroll direct deposit can be accepted from your employer.

TIAA-CREF Tuition Financing, Inc., Plan Manager. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the Bright Start Direct-Sold College Savings Program.

Michael W. Frerichs
Illinois State Treasurer
Trustee and Administrator

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