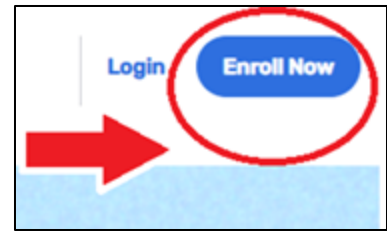


# How to open an **Indiana529** Account for free

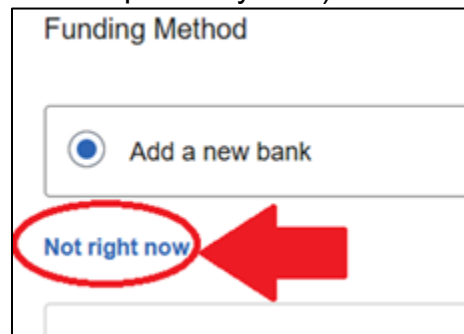
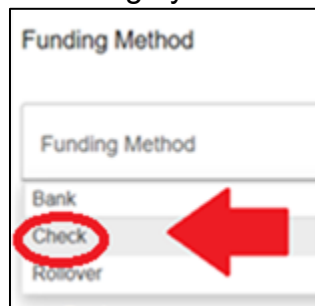


1. Go to [indiana529direct.com](https://indiana529direct.com) and click “Enroll Now.”

2. You will be asked to set a username and password, and you’ll be asked for your name, address, email address, date of birth, and SSN as well as your child’s name, date of birth, and SSN. Record the username and password for your records.

3. When prompted, indicate that you are saving for “My child” in an “Individual account” with the goal of saving for “Higher education expenses.”

4. On the “Contributions” screen, you are welcome to make a deposit by entering your bank account information. But remember that this is never required. To skip the deposit, on the “Contributions” screen, click “Funding Method” and choose “Check.” On the next screen, called “Recurring Contributions,” click “Not right now.” (Choosing the “pay by check” option means you won’t need to add money today or ever. Of course, you can change your mind and make a deposit anytime!)

A screenshot of the 'Who are you saving for?' form. It asks for the beneficiary's relationship to the user. Options include 'My child' (selected), 'My grandchild', 'A niece/nephew', 'Myself', and 'Someone else'. Below this, it asks 'What type of account are you opening?' with options 'Individual Account' (selected) and 'UGMA/UTMA Account'. At the bottom, it asks for the 'Savings Goal(s)' with 'Higher Education Expenses' selected.

5. On the “Investments” screen, many families click “Keep it simple.” You can always change the allocations later.

6. Check the boxes for “Delivery Method” and “Terms and Conditions.” Finally, click “Open Account,” and you will see your new 11-digit 529 account number. Record the account number for your records.

A screenshot of the 'Investment Strategy' screen. It shows a radio button selected for 'Keep it simple with Year of Enrollment Portfolios'. Below this, there is a brief explanation: 'We identify a portfolio that aligns with your beneficiary's age and will automatically adjust over time without any extra work from you.'