

Quick Start Checklist

CONGRATULATIONS!

You've taken the first step toward saving for your child's future education. Use this checklist to guide you through the process of opening a Maryland College Investment Plan Account (MCIP). If you have any questions along the way, please call a College Savings Specialist at **888.4MD.GRAD (463.4723), ext. 1.**



Determine who will serve as the Account Holder and Beneficiary of record for the MCIP Account. We strongly recommend adding a successor Account Holder to take over the Account in the event of unforeseen circumstances. Naming a successor Account Holder will help avoid delays and/or legal hurdles.



Gather Account Holder and Beneficiary information including:

Name	Residential Street Address
Date of Birth	Bank Routing Number*
Social Security Number	Bank Account Number*



Research the **investment options** and choose one or more for an investment strategy that works best for you.



Wondering how much you will need to save?
Use the **College Savings Calculator** to help you set a goal.



Choose how much and how often you wish to contribute. You can make an initial contribution, or make a recurring contribution through Automatic Monthly Contributions (AMC) or payroll deduction. The minimum contribution to get started is \$25.



OPEN AN ACCOUNT

It's easy to open your Account:

- Go online to **Maryland529.com**; **-OR-**
- **Download a New Account Enrollment Form**

If you need help, call a College Savings Specialist at 888.4MD.GRAD (463.4723), ext. 1. We'll be glad to help you with whatever you need.

*For Account Holders only, optional at the time of Account setup.

The **Maryland Senator Edward J. Kasemeyer College Investment Plan's Disclosure Statement** provides investment objectives, risks, expenses and costs, fees, and other information you should consider carefully before investing. If you or your Beneficiary live outside of Maryland, you should compare Maryland 529 to any college savings program offered by your home state or your Beneficiary's home state, which may offer state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in such state's 529 plan. Tax benefits may be conditioned on meeting certain requirements, such as residency purpose for or timing of distributions, or other factors, as applicable.