

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 Prepaid College Trust (MPCT) Account. If you have any questions along the way, please call a Customer Relations Specialist at **1.888.4MD.GRAD (463.4723), ext. 2**.



Determine who will serve as the Account Holder and Beneficiary of record for the MPCT Account. We strongly recommend adding an Account Holder Successor to take over the Account in the event of unforeseen circumstances. Naming an Account Holder Successor 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 or Taxpayer I.D. Number	Bank Account Number*



Select your **Tuition plan and payment option**, based on the grade/age of the Beneficiary.



Decide how you will provide funding for the Account. Payments can be made by check, money order, or electronic funds transfer on either an automatic or one-time basis.



OPEN AN ACCOUNT

It's easy to open your Account:

- Download and review the **MPCT Disclosure Statement**
- **Go online** and select Enroll Now

If you need help, call a Customer Relations Specialist at 888.4MD.GRAD (463.4723), ext. 2. 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 Prepaid College Trust 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.