



GA 529 Plan Set Up

Ga 529 plans are a great start to savings for your child's college. You can contribute as little as \$25 to start. Also, contributions up to \$2000 per year can be deducted from your Georgia tax return (income limits do apply). We can walk you through this process or you can follow the instructions below. Let us know if you have any questions.

1. Go to GA Path 2 College 529 Plan website - <https://www.path2college529.com>
2. Click on Account Forms
 - a. Open an Account
 - b. You can either Enroll Online or Download Enrollment Materials (to mail in)
 - c. Select Custodial
 - d. Print the forms
 - e. Custodian Information – this will be the person that will own the account
 - f. Minor (Beneficiary) – this will be the child for whom the account is being set up
 - i. You will need their date of birth and SSN
 - g. Initial Contribution
 - i. You can set up a bank account to make deposits or mail in a check
 - ii. Minimum amount is \$25 or \$50 depending
 - h. You want your contributions to go into the MANAGED ALLOCATION OPTION (AGE BASED)
 - i. Bank Information
 - i. Fill out only if you are going to set up monthly or quarterly transfers from your bank. Mail in a voided check with application.
 - ii. They do not need you bank information if you plan to make contributions by check.
 - j. Make checks payable to: Path 2 College 529 Plan
 - k. Be sure to sign the application and keep a copy for your record!

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