



## 529 Plan Enrollment Instructions

1. Please access the internet and log on to: <https://www.putnam.com/corporate529/>
2. This link will bring you to a dedicated 529 website through Putnam which will have educational material regarding the 529 Programs by clicking "View available funds" such as college planning calculators, research tools, videos and much more.
3. When you are ready to get started click the "Enroll now" tab and enter the following numbers:

In the ID field enter – **236590203-529**

In the PIN field enter – **92614**

Enter your Social Security Number - \_\_\_\_ - \_\_\_\_ - \_\_\_\_

4. Follow the instructions and fill in the fields to set up your account. You will be asked to set up an account owner, successor owner, and beneficiary, choose your investment options, and contribution amounts. You will need the Social Security Numbers and Dates of Birth for your designated beneficiaries to complete the application.
5. You will be asked to select a contribution method. You are able to contribute by either sending checks to Putnam on an ad hoc basis, by setting up an electronic link to your bank (savings or checking) account for recurring or ad hoc contributions, OR by contributing through your payroll each pay period.
6. **If you have elected Payroll Contributions, please print the Summary page and the Payroll Deduction Request form. Please give the Payroll Request form to the Payroll Department to have your deductions start at your next paycheck.** Please keep a copy of the Summary page for your records. Failure to do so will result in contributions NOT being set up for your account. Going forward, your enrollment requests and changes to your deduction amounts will be submitted bi-weekly to be included in the following paycheck.
7. You will receive a welcome package from Putnam Investments that will give instructions to establish your internet access for your 529 account. With web access you may view daily pricing updates, see news related to the 529 Programs, and make changes to your account.

8. With any question please call us directly at 626-768-4453 or email us at:  
[401kparticipants@penniall.com](mailto:401kparticipants@penniall.com).

Regards,

Penniall & Associates  
[www.penniall.com](http://www.penniall.com)