

What You'll Need to Open a Michigan 529 Advisor Plan Account

Investments

- Review & Select Investment Portfolios

Account Owner Information

- First and Last Name
- Social Security Number
- Date of Birth
- Mailing Address
- Email Address
- Phone Number

Beneficiary Information

- First and Last Name
- Social Security Number
- Date of Birth
- Mailing Address

Contingent Account Owner Information (optional)

- First and Last Name
- Social Security Number
- Date of Birth
- Mailing Address
- Email Address
- Phone Number

Funding Information

- Type of Account (checking or savings)
- Account Number
- Routing Number
- Name on Account
- Bank Name
- Bank Telephone Number

To Fund Via Personal, Teller's or Cashier's Check

Make checks payable to, or endorsed to:

Michigan 529 Advisor Plan
PO Box 55070
Boston MA 02205-5070