1.

Scholars Choice X

EDUCATION SAVINGS PLAN BY COLLEGEINVEST

Scholars Choice Education Savings Plan® **Payroll Direct Deposit Form**

- If you're updating your payroll contribution per pay period, please update through your employer's payroll department or online self-service portal if available.
- If you're changing the amount per beneficiary account, please login to your Account at **scholars-choice.com** to update.
- After this form is processed, you will receive a Payroll Direct Deposit Confirmation Form, which you must sign and submit to your employer's payroll department or if your employer offers a self-service portal to set-up payroll direct deposit, you do not need to submit this confirmation to your employer, instead follow the routing instructions provided and enter into the portal. Your payroll direct deposit instructions will not take effect until your employer has processed your signed form or submitted your request through the self-service portal.
- Type in your information and print out the completed form, or print clearly, preferably in capital letters and black ink. Mail the form to the address listed. Do not staple.
- For faster processing, you can complete this request and receive your confirmation with instructions online at **scholars-choice.com**.

To request assistance in completing this form call us at **1-888-5-SCHOLAR** (1-888-572-4652), Monday through Friday from 9:00 a.m. - 10:00 p.m. ET.

Account Owner Information		
Account Number	Employee ID <i>(if required by your employer)</i>	
Account Owner (First name)		 .1.)
Account Owner (Last name)		
Telephone Number (In case we have a question about your Account)		

Employer Information

Name of Employer		
Employer Address		
Employer City	State Zip Code	
Payroll Department Contact Name	Telephone Number	Extension <i>(if any)</i>





Regular mailing address: Scholars Choice PO Box 219372 Kansas City, MO 64121

Overnight mailing address: Scholars Choice 1001 E 101st Terrace, Suite 200 Kansas City, MO 64131



1

Check one:	tart Payroll D	irect Deposits	CI	hange Amount	Stop Pa	ayroll Direct Deposits (Skip to Sectio
Deduct \$		1 from m	novehook /or	an after tay basis		riod and allocate the amount among m
Scholars Choice					/ eacii pay pei	iou anu dhocate the dhount dhoty h
Scholars Choice	Luucation	savinys rian	Accounts as			
Please use an add	tional sheet i	if you have mo	re than four A	Accounts.		
						\$00
Account Number						Dollar Amount
Beneficiary (First name	L L L /					
Beneficiary (Last name	 /					
						\$ 0 0
Account Number						Dollar Amount
Beneficiary (First name)					
Beneficiary (Last name)					
						\$000
Account Number						Dollar Amount
Beneficiary (First name)					
Beneficiary (Last name)					
						\$0_0
Account Number						Dollar Amount
Beneficiary (First name)					

4. Employee (Account Owner) Signature — YOU MUST SIGN BELOW

By signing below, I authorize my employer to remit payroll direct deposits to the above-stated Scholars Choice Education Savings Plan Account(s).

I certify that I have read and understand, consent, and agree to all the terms and conditions of the Scholars Choice Education Savings Plan Description and understand the rules and regulations governing the **Scholars Choice Education Savings Plan**. Further, I understand that none of the Scholars Choice Education Savings Plan, CollegeInvest, the Colorado Department of Higher Education, Nuveen Securities LLC., TIAA-CREF Tuition Financing, Inc., Ascensus College Savings Recordkeeping Services, LLC and its affiliates are responsible for any claims I may make and/or losses resulting from my employer's failure to timely and accurately process my contributions via payroll direct deposit. This authorization will remain in effect until cancelled by me or by the Scholars Choice Education Savings Plan, or upon termination of my employment.

Signature of Account Owner

_____ — ____ — ____ _ ___ ___ _____ Date (mm-dd-yyyy)

Employee Checklist

- Be sure to include your account number(s) for <u>each</u> Beneficiary listed on this form in Section 3.
- Your payroll direct deposit form will be rejected by the Scholars Choice Education Savings Plan in its entirety if your allocation for each Beneficiary does not equal 100%.
- Complete your payroll direct deposit set-up through your employer's self-service portal or give a copy of the payroll direct deposit confirmation to your employer.
- Mail the original copy of this form to the Plan. It may take up to 10 business days from the receipt of this form before a payroll direct deposit
 can be accepted from your employer.

