



## Setting up Your 529 Plan



1. Open a ScholarShare 529 college savings account at **ScholarShare.com** or download the paper application.
2. If the account is established online you will instantly receive an account number. If done via paper application, you will receive a confirmation letter with the account number via U.S. mail.
3. To setup your payroll direct deposit into the account, login to the ADP Self-Service Employee portal using your assigned credentials (e.g. JDoe@LesleyU) by going to <https://portal.adp.com>. Once logged-in to the ADP Self-Service Employee Portal, click on the "Pay & Taxes" drop-down menu, then click on the "Direct Deposit" link.
4. To add a new 529 direct deposit, click "Add New."
5. Select from the following accounts "D1, D2, D3, D4, or D5."
6. Select "Partial Amount" to enter a flat dollar amount. Select "Full/Remaining" if you want to contribute your entire pay check or a remaining amount.
7. Enter your Bank Transit Number: **011000028**.
8. Enter your account number, 17-digit field (do not use any dashes or spaces), as follows:
  - a. The first 8 digits identify the Plan, use the Plan's 8 digit DD number: **99058463**.
  - b. The next 9 digits identify the Account. Use the 9-digit account number (if the account number is less than 9 digits, use "0"s as lead numbers to bring the account number to 9 digits.)
9. If you want to change your contribution amount, follow step 3, then click the appropriate direct deposit account and make the desired changes
10. If you want to stop your contribution, follow step 3, then click the appropriate account and choose 'DELETE'. NOTE: When deleting a 'full net deposit' account, you must wait to receive an approval email before adding another 'full net deposit' account.

**Note:** If you want to have your deposit split between multiple investments on the same account you must also complete a ScholarShare Direct Deposit Allocation form. Once completed, send the completed and signed original ScholarShare Direct Deposit Allocation form directly to ScholarShare.

### Important

Your first deposit will go through a pre-note process. Once the direct deposit information has been verified, (which takes a full payroll cycle), your deposits will be sent to ScholarShare.