



Utah Educational
Savings Plan®

Utah's 529 College Savings Plan

UVSC Employee Instructions to Set-Up Payroll Deduction with the Utah Educational Savings Plan (UESP), Utah's 529 college savings plan.

To begin Payroll Deduction through UVSC, you must first **open a UESP account**.

Prior to setting up your UESP account, please read the Program Description for complete details (e.g., fees, investment options, risks). The Program Description is available on-line at www.uesp.org or call 1.800.418.2551 for a copy.

An account may be opened for a beneficiary by anyone 18 years of age or older with a valid U.S. Social Security or Taxpayer Identification number. This person becomes the owner of the account. An Account Agreement, Form 100, must be completed, signed, and sent to UESP by the account owner by mail, by fax, or in person. There can be only one account owner per account, although successor account owners may be designated to assume control of the account upon the death of the account owner.

You will receive your UESP account number within two weeks. After receiving your UESP account number, setup on-line account access by following these easy steps.

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- Step 1: Go to www.uesp.org
 - Step 2: Click on "Account Access"
 - Step 3: First time users click on "Setup User ID/Password"
 - Step 4: Fill in required information and click "Continue"
 - Step 5: Fill in user name and password, and click "Continue"
 - Step 6: Click on "Payroll Deduction," which will take you to the Payroll Deduction screen
 - Step 7: Enter the Employer Code **UVSC529** and click "Submit"
 - Step 8: Enter Employee ID Number and click "Submit"
 - Step 9: This screen will list all of your UESP accounts. Enter "New Deduction Amount" for each account you would like to contribute to through payroll deduction. Read carefully all information at the bottom of the screen and click "I Agree."
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You have now submitted a pending payroll deduction to your employer. Your human resources or payroll department will confirm your request. Once your request has been approved, the new or revised payroll deduction will begin.

You can change your payroll deduction amount at any time by logging on to your account and following Steps 6 and 9 above.

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Disclosures

Read the Program Description for more information and consider all risks, objectives, and expenses before investing. Call 1.800.418.2551 for a copy of the Program Description or visit www.uesp.org.

Investments in UESP are not guaranteed by any state or federal agency. You could lose money.

Non-Utahns should check their and their beneficiary's state's 529 plan for state tax or other benefits not offered through UESP.

The earnings portion of withdrawals used for nonqualified expenses is subject to federal income tax, any applicable state tax, as well as an additional 10 percent federal penalty tax.