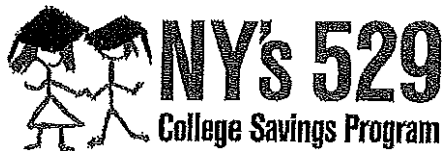


Educational Services That Transform Lives

Nichelle Rivers, Ed.D.
Assistant Superintendent for Human Resources
James Hines Administration Center
Department of Human Resources
201 Sunrise Highway, Patchogue, NY 11772
Phone: (631) 687-3029 Fax: (631) 240-8963
Email: humanresources2@esboces.org
www.esboces.org

Memorandum

To: Benefit Eligible Employees
From: Department of Human Resources
Date: 2024
Re: 529 College Savings Program information



Employee enrollment and payroll deduction procedures

Follow these simple steps to get started saving in New York's 529 College Savings Program DirectPlan. It only takes \$15 (with payroll deduction) and 10 minutes to open an account.

Be sure to read the ***Program Brochure and Tuition Savings Agreement***, which contains important information, including certain risks associated with, and the terms under which you agree to participate in, the *Direct Plan*.

Online enrollment

It takes 10 minutes to open an account

Step 1

Go to the plan's Web site at www.ny529atwork.com and select **Open an Account**.

Step 2

Follow the step-by-step instructions until you reach the "**Funding Your Account**" page, where you select **Payroll Deduction**.

Step 3

At the end of the enrollment process, you'll be asked to print out a ***Payroll Deduction Authorization*** form. This form is prefilled with your name, the total payroll deduction amount, your unique account number, and routing (ABA) number for the plan's bank.

Submit this form to your employer's **Payroll Department**. (In some cases, your employer may require you to complete an additional internal form to authorize payroll deduction.)

Step 4

Your employer will update the payroll system with your payroll deduction information and begin sending your contributions to the *Direct Plan*.

Note: Employees who already participate in the *DirectPlan* can choose payroll deduction by logging on at: **www.ny529atwork.com**, selecting **Asset Management**, and selecting **Manage Payroll Deduction**. Then simply print the *Payroll Deduction Authorization Form* and follow the **Instructions in step 3 above**.

Paper enrollment application

Process takes 2-3 weeks

Step 1

Download and read an enrollment kit from **www.ny529atwork.com** or call **1-800-420-8580** to have one mailed to you.

Step 2

Complete the *Enrollment Application* and, in the **Initial Contribution** section of the form, select **Payroll Deduction** as the method to fund your account.

Step 3

Return the completed application to: **New York's 529 College Savings Program *Direct Plan*, P.O. Box 55441, Boston, MA 02205-5441.**

Step 4

Once the application is processed, you'll receive a *Payroll Deduction Authorization*. This form is prefilled with your name, the total payroll deduction amount, your unique account number, and the routing (ABA) number for the plan's bank. **Submit the signed form to your employer's Payroll Department**. (In some cases, your employer may require you to complete an additional internal form to authorize payroll deduction.)

Step 5

Your employer will update the payroll system with your payroll deduction information and begin sending your contributions to the *Direct Plan*.