

EDVEST AT WORK



Paying for higher education is one of the most important financial goals for your employees with families.



Bright futures built in Wisconsin.

Edvest At Work is a financial wellness benefit designed to help your employees save for their children's or grandchildren's higher education, minimize student loan debt and build a skilled Wisconsin workforce.

With low fees, unique tax benefits and payroll direct deposits to an Edvest 529 account, *Edvest At Work* offers your employees one of the most effortless ways to help achieve their college savings goals.



**EASY TO
SET UP**



**EASY TO
ADMINISTER**



**EMPLOYER WI
TAX CREDIT**



**NO
REPORTING**



**NO CONTRACT
REQUIRED**



**NO EMPLOYER
COST**



Financial Wellness, Simplified.

Administering *Edvest At Work* is Free and Easy.

Instructions for your employees are available at **Edvest.com/employer**.

Plus, Edvest 529 offers ongoing support at no charge during your annual benefits enrollment period or any other time throughout the year.

Visit Edvest.com/employer to learn more.



Edvest 529 can help your financial wellness program.



Download free college savings brochures and information.



Request a college savings webinar or speaker for employee events.



Invite a College Savings Specialist to your benefits or wellness fair.

Employee Direct Deposit into an Edvest 529 Account is Easy!



Employee opens an account at Edvest.com then adds direct deposit.



Simple routing instructions are provided for self-service payroll or may be printed for your HR team.



¹To learn more about Wisconsin's Edvest 529 College Savings Plan, its investment objectives, risks, charges and expenses please see the Plan Description at Edvest.com. Read it carefully. Consult your legal or tax professional for tax advice. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss.

TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, is the distributor and underwriter for the Edvest 529 College Savings Plan. FGN-2753563PR-Y0324P



SETTING UP PAYROLL DIRECT DEPOSIT

Step 1: Allocate your direct deposit amount on Edvest.com.



Log into your account at [Edvest.com](https://www.edvest.com). Go to the “[Profile & Documents](#)” section on the home screen and select “[Payroll Direct Deposit](#),” then “[Change Payroll Instructions](#).” Enter the dollar amount per paycheck (and per beneficiary if you have more than one account to be contributed per paycheck). Select “[Next](#).” View or print the payroll direct deposit instructions by selecting “[Get Form](#).”



Step 2: Inform your employer how much you'd like sent to Edvest each pay period.

Follow the payroll direct deposit instructions you printed or viewed in Step 1. Input the routing instructions into your employer's self-service portal. If your employer does not offer a self-service portal, provide the printed and completed form to your payroll office.

IMPORTANT TIP: If you are funding more than one Edvest account through payroll direct deposit, only add ONE payroll deduction in the TOTAL amount of all Edvest account contributions for each pay period. Example: You have two Edvest accounts that you indicated in Step 1 will each receive \$25 per paycheck. In your employer's self-service portal, or via your payroll direct deposit instructions form, list one deduction in the amount of \$50. Your first contribution may take up to 1-3 pay periods.

Direct deposit routing instructions (for your employer):

Account Type: Checking

ABA Number: 011001234

Account Number: 584+first 9 digits of Edvest account number



For questions
about Edvest or
establishing your
payroll
contributions,
contact:

Kevin Pytleski,
Edvest Consultant
608.234.6317
Kevin.Pytleski@tiaa.org
Middleton, WI 53562

