

What You'll Need to Open an Oklahoma 529 College Savings Plan Account



Investments

- ✓ Review & Select Investment Options

Account Owner Information

- ✓ First and Last Name
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Mailing Address
- ✓ Email Address
- ✓ Phone Number

Beneficiary Information

- ✓ First and Last Name
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Mailing Address

Contingent Account Owner Information (optional)

- ✓ First and Last Name
- ✓ Social Security Number
- ✓ Date of Birth
- ✓ Mailing Address
- ✓ Email Address
- ✓ Phone Number

Funding Information

- ✓ Type of Account (checking or savings)
- ✓ Account Number
- ✓ Routing Number
- ✓ Name on Account
- ✓ Bank Name
- ✓ Bank Telephone Number

To Fund Via Personal, Teller's or Cashier's Check

Make checks payable to, or endorsed to:

Oklahoma 529 College Savings Plan
PO Box 8193
Boston, MA 02266-8193

For Payroll Deduction

If you wish to have contributions automatically taken from your paycheck, check for program availability with your employer and then submit the proper forms by mail. Forms can be found in the [Managing Your Account section](#) of the Oklahoma 529 College Savings Plan website.