



Learning Quest® 529 Education Savings Program

Online New Account Set Up

January 2021

Glossary



As you go through the online application for your Learning Quest account, these are some terms you will see and their definition:

- Account Owner(s) The person(s) who opens the account and has the authority to make contributions, withdrawals, request portfolio changes, etc. Must be over 18 years of age and a US Citizen or Resident Alien.
- Successor Account Owner The person who will contact American Century Investments in the event of the death of all Account Owners. Must be over 18 years of age and a US Citizen or Resident Alien. This is optional and can be added or changed at any time.
- Beneficiary The student for whom the account is being established. Must be a US Citizen or Resident Alien.

See the Handbook available on our website at www.learningquest.com for more information about the plan.



Reminders and Contact Information



- Before you begin, make sure to have the Social Security Number or ITIN for the Account Owner(s) and Beneficiary as well as date of birth and address.
- Take a look at the investment options on our website (<u>www.learningquest.com</u>) under the INVEST tab. You will see options for Age Based Portfolios and Static Portfolios. You can view the underlying mutual funds, past performance and fee's by clicking on any of the portfolios.
- Always click on "Continue" or "Next". Do not click on "Save" or it will kick you out of the online application
- Call the Learning Quest Specialist Team at 1-800-579-2203 for assistance. The specialists are available Monday through Friday from 8:00 am 5:00 pm.



Online Application – www.learningquest.com

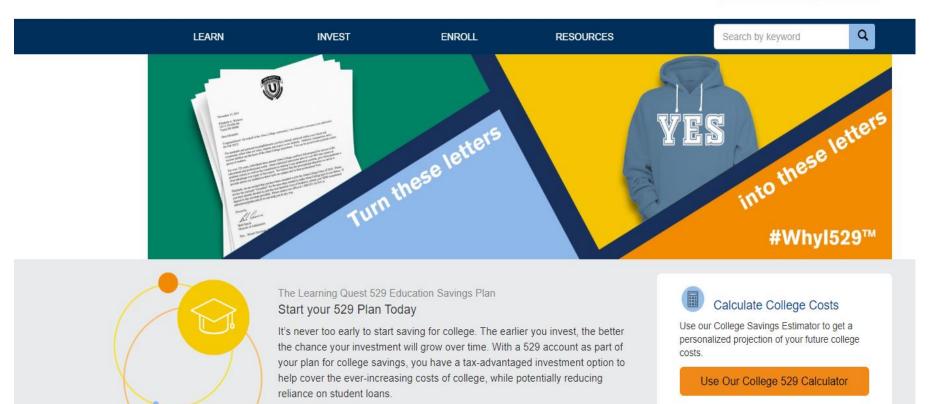




Click Here

Need Help? Call (800) 579-2203

Open an Account Log In





Online Application – www.learningquest.com



Be sure to look through these tips before moving to the next page of the online application so you have everything you need.



Getting Started

Setting up your Learning Quest Account, the Kansas 529 Plan

Please have this information ready before you start...



About you: Address, birth date, Social Security number*. If you are opening a joint account, you will also need address, birth date and Social Security number of the joint owner*.



About your investments (how your contributions will be invested): To learn more, see the Learning Quest Handbook.



About your successor (Optional but recommended — Name a Successor Account Owner who will assume ownership of the Account in the event of incapacity or death of all account owners): Birth date, mailing address, Social Security number and phone number*.



About your bank (if you're going to have contributions taken from a checking or savings account): Your bank account number and bank's routing number.



About your beneficiary (The person whose Qualified Education Expenses will be paid for with the Account assets): Birth date, Social Security number*, mailing address if different than the account owner. If you are opening an account in the name of a trust or business or using proceeds from a Coverdell Education Savings Account, use this form.

*We are required by federal law to obtain, verify, and record information that identifies each person who opens an account. If you don't provide the requested information, we may not be able to open your account. If we are unable to verify your identity, the Plan reserves the right to close your account and return any contributions or take other steps we deem reasonable.

Before completing the application, be sure to read the <u>Learning Quest Handbook</u>.



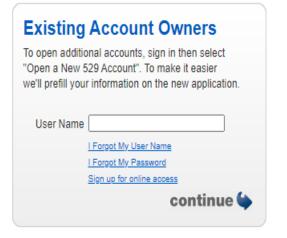
Online Application – www.learningquest.com



Promo Code – Enter PITCH (for NextPitch)

To open a saved enrollment, click here.







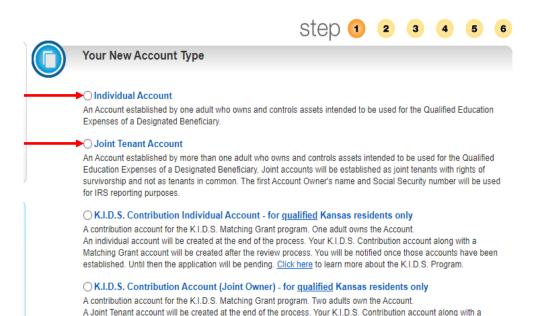
Online Application – Account Type



Select Individual or Joint Tenant Account

○ UGMA/UTMA Account*

Learning Quest Specialist at 1-844-691-0303.



Matching Grant account will be created after the review process. You will be notified once those accounts have been established. Until then the application will be pending. <u>Click here</u> to learn more about the K.I.D.S. Program.

An Account funded with assets held in an UGMA/UTMA custodial account for the benefit of the Designated Beneficiary indicated on this Account Application. The custodian will be treated as the owner of the Account and has the duty to transact on behalf of the minor until the custodianship terminates under the terms of the Act under which

*Registration type is not available in the K.I.D.S. Matching Grant Program. For more information, please contact a

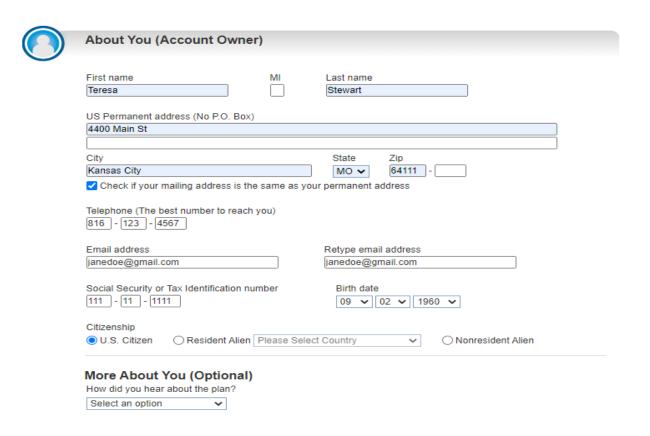
it was established. The Designated Beneficiary, who is the minor, cannot be changed.



Online Application – Account Owner



Enter the information for the adult who will be the Account Owner. Note: If you are a resident alien, enter your ITIN and indicate your country of citizenship.





Online Application – Successor Account Owner



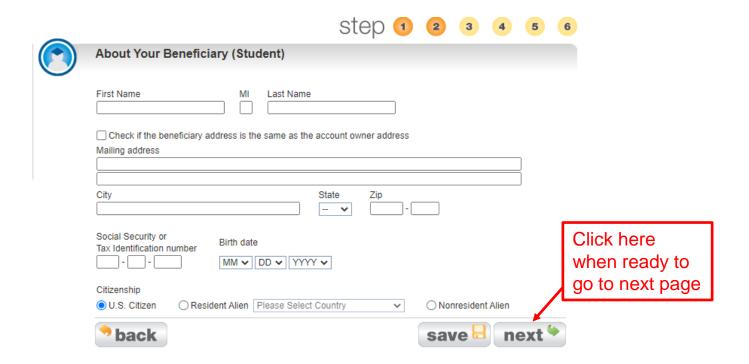
The Successor Account Owner can be added and/or changed at any time. Note: If you selected Joint Tenant Account, this may pop up before you enter the Joint Account Owner information.

)	About Your Successor Account Ow	ner (Optional)	
	The successor account owner will assume owners owners.	hip and control of the account in the event of death of all account	
	First name MI	Last name	
	Birth date MM ▼ DD ▼ YYYYY ▼		
	Mailing address		
	City	State Zip	
	Telephone (The best number to reach your successor)	Social Security or Tax Identification number	Click here when ready to go to next page
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Online Application – Beneficiary



Enter the Beneficiary (student's) information





Online Application – Investment Selection

Choose how you'd like your money to be invested from the options below

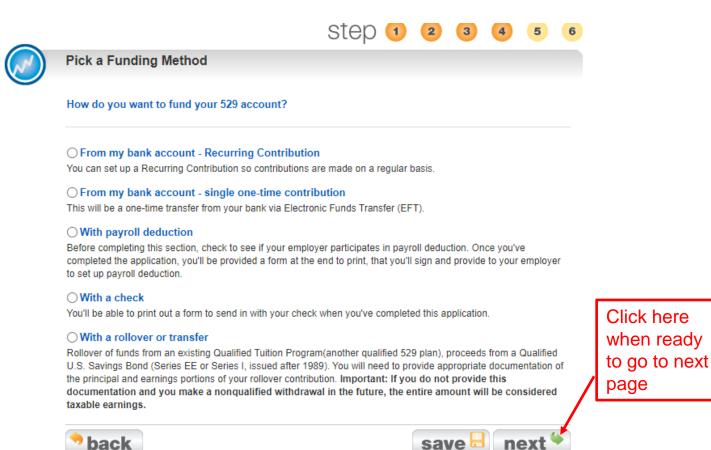


Select your investment option. The total must equal 100% before you can select NEXT

	on an icon for information about each investment. You must allocate 100' ntages only.The Plan's default portfolio is the Age Based Conservative Ti	-		
The po	Based Options ortfolios shown below are based on the beneficiary's age. As the benefici ressively more conservative portfolio within the track you select.	iary gets older, your assets will move to		
	Index Track: 20% Equity Index Portfolio	<u></u> %		
	Aggressive Track: 30% Equity Portfolio	%		
	Moderate Track: 20% Equity Portfolio	%		
	Conservative Track: 10% Equity Portfolio	<u></u> %		
	Portfolio Options sets will remain in the portfolio(s) you select until you choose a new Inve	estment option.		
	100% Equity Portfolio	<u></u> %		
	90% Equity Portfolio	<u></u> %		
	70% Equity Portfolio	<u></u> %		
	60% Equity Portfolio	%		
	50% Equity Portfolio	%		
	30% Equity Portfolio	%		
	20% Equity Portfolio	%		
	Short-Term Portfolio	<u></u> %		
	Total Growth Index Portfolio	<u></u> %		
	500 Index Portfolio	<u></u> %	Click here when	
	Balanced Index Portfolio	<u></u> %	ready to go to	
	Total Bond Market Index Portfolio	%	next page	
	Cash and Cash Equivalents Portfolio	<u></u> %	Toxt page	
	TOTAL	%		
🥠 l	pack	save 🖯 next 🐤	LearningQu	uest

Online Application – Funding Method







Online Application – Delivery Method



Choose your delivery method

Quarterly Statements and Learning Quest Handbook Updates

- Notify by email for all online statements/updates
- O Notify by email for online statements/updates; mail year-end statement
- Mail all statements/updates

Transaction & Profile Confirmations

- Notify by email
- Mail confirmations

Tax Forms

- Notify by email
- O Mail tax forms

Note: Requisite tax forms intended for the beneficiary will be mailed to the beneficiary's address on record regardless of the delivery option selected above.

IMPORTANT INFORMATION REGARDING E-COMMUNICATION

The terms below apply to your election to receive electronically one or more of the following types/categories of documents related to your 529 account(s): tax forms, account statements and Learning Quest Handbook updates, and transaction confirmations. If you don't elect e-communication, we will send you paper documents

How is the consent to e-communication applied and how long does it last?

Your consent applies to all documents required for all Learning Quest accounts registered under your Social Security or taxpayer identification number, including custodial accounts established under the Uniform Gifts to Minors Act or the Uniform Transfers to Minors Act. Your consent will be effective until you revoke it or the plan revokes it. Upon revocation, it may take several weeks before you start receiving information via U.S. mail.

How will I know when documents are available online?

You'll receive an email notice whenever a new document is available online.

- Transaction and maintenance confirmations on your account are generally available online on the next business day following the trading or account activity.
- Account statements are available online approximately 5 days after the end of each statement period.
- To view any document online, go to <u>learningquest.c</u>
 "Profile and Documents" and then "Statements, Cor

How are documents retained?

You can download and/or print any documents or request a free

I/We agree to receive documents related to my/our 529 at above. If I/we have chosen to receive documents electror carefully read the terms and information regarding electroreceive documents electronically as set forth above.



Be sure to

here

read and click



Click here when ready o go to next page



Online Application – User Name, Password, Security Questions



Create your User
Name and
Password. Select 3
security questions
and answers.
Choose a Security
Image and indicate
if you would like us
to require a PIN.

Create User	r Name and Password
You will be able to us	se this user name and password to access your account.
User Name	(Must be 6-25 characters)
	(Your password must be at least 8 characters long and contain at least 3 of the 4 following criteria: upper case, lower case, numeric, or special characters such as !, @, #, \$, % etc.)
Retype Password	
	assword, you will be asked to answer one of these questions to reset your password. ue answer for each of the 3 security questions. The answers must be alphanumeric and at
Question	Select a question
Answer	
Retype answer	
Question	Select a question
Answer	
Retype answer	
Question	Select a question
Answer	
Retype answer	



Online Application – Security Image, Trusted Device



Choose Sec	urity Image						
our security image consists of an image and personalized image name that is shared between you and Learning Quest. Your security image will be lisplayed after you enter your user name every time you log in. You should never enter your password without verifying your security image.							
Choose an image by image each time you		ages below, and then en	ter your personalized, ea	sy-to-recognize name w	hich will display under your		
9 0							
1							
Image Name							

Trusted Devices Should we require a PIN when you log in with this device? No. This is a "trusted device." Yes. Please require extra security with this device.

Click here when ready to go to next page

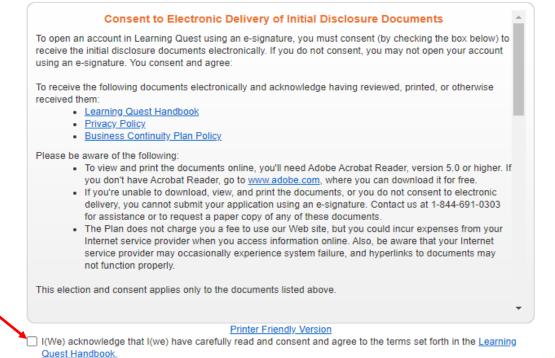
continue 🖁



Online Application – Consent and Signature(s)

Review the information you entered and confirm everything is correct. Then read the information below and click on any of the links to view the materials (i.e. Handbook)

Check this box. If you selected a Joint Account Type, both Account Owners will have a box to check.



Click here for your electronic signature





Online Application – Account Number



Congratulations
You have
successfully
created your
account!



Maximize your college savings - here's how!

Don't miss out on these features and programs that can help you save.

Add a Trusted Contact to your Account

You may designate someone you trust who is at least 18 years of age (a "Trusted Contact") to act as a resource if we lose contact with you or believe you and/or your assets are at risk.

get started 6

print

Ugift® anytime contributions

Get a Ugift code number, so family and friends can make gift contributions to your beneficiary's 529 account at any time. You can get your Ugift code at a later time, if you prefer."

get Ugift code View Ugift FAOs

* By opting in, others will be able to view your and your beneficiary's names if they enter your Ugift code at Ugift529.com

Automatic Contributions



Save for higher education little by little! A Recurring Contribution lets you invest over time by putting your contributions on autopilot. It's simple to set up and your contributions can be withdrawn directly from your bank account monthly or even quarterly. What could be easier? (See Recurring Contribution note below.)



Disclosures

Before investing, carefully consider the plan's investment objectives, risks, charges and expenses. This information and more about the plan can be found in the Learning Quest Handbook, available by contacting American Century Investment Services, Inc., Distributor, at 1-800-579-2203, and should be read carefully before investing. If you are not a Kansas taxpayer, consider before investing whether your or the beneficiary's home state offers a 529 plan that provides its taxpayers with state tax and other benefits not available through this plan.

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As with any investment, withdrawal value may be more or less than your original investment.

This material has been prepared for educational purposes only. It is not intended to provide, and should not be relied upon for, investment, accounting, legal or tax advice.

Notice: Accounts established under Learning Quest and their earnings are neither insured nor guaranteed by the State of Kansas, the Kansas State Treasurer or American Century.

ADMINISTERED BY KANSAS STATE TREASURER

Managed by American Century Investment Management, Inc.

American Century Investment Services, Inc., Distributor 4500 Main Street, Kansas City, MO 64111

