

Let's get started!

JUST LIKE YOU, the Oklahoma College Savings Plan and SEED for Oklahoma Kids know your child has a bright future. That's why we make it easy to start saving for college now.

To sign up for SEED OK, you will need to fill out and mail two forms located in your SEED OK green folder.

The directions in this booklet help you fill out these forms.

Questions? Read the *Answers to Frequently Asked Questions* or call us.

SEED OK
SEED for Oklahoma Kids



1-866-733-3465





Checklist

1 Complete, sign, and mail the Match Eligibility Formpage 2

Time it takes: 5 minutes

Why do it? Allows Oklahoma to check if you qualify for a Savings Match

- ☐ Fill out the Match Eligibility Form
- ☐ Mail it to SEED OK in the stamped envelope

2 Complete, sign, and mail the Oklahoma College Savings Plan (OCSP) Account Applicationpage 4

Time it takes: 20 minutes

Why do it? Opens an account for your child where you can deposit money. Act by April 15, 2009 and the state will provide the \$100 initial deposit for you!

- ☐ Fill out the OCSP Account Application, either on paper or online
- ☐ Mail it to OCSP in the postage paid envelope (paper version only)

3 Save money in your Oklahoma College Savings Plan Account! page 11

Time it takes: 5 minutes every time you do it

Why do it? Save money for your child's education, plus you may qualify to have your savings matched.

- ☐ You, or family and friends, can deposit money into this account as often as you want.

1 How to fill out the Match Eligibility Form:

Returning the Match Eligibility Form gives the State of Oklahoma permission to share the following information with the State Treasurer's Office:

- Adjusted Gross Income (from 2007-2009 tax returns)
- Public benefits receipt (such as Food Stamps, Medicaid, or Temporary Assistance to Needy Families)

The State Treasurer's Office will use this information to see if you qualify for the Savings Match. Your information is confidential and will not be shared. They will use it only to determine if you qualify for the Savings Match.


If you qualify, SEED OK will match the deposits you make to your child's Oklahoma College Savings Plan account, up to \$250 per year. By receiving this Savings Match, you may be able to double the amount of money you're saving for your child's education.

You **must** fill out and return this form to receive the Savings Match into your child's SEED OK account.



It will take 5 minutes to fill out this form.

Find your Form, which look like this at top:



MATCH ELIGIBILITY FORM

OKLAHOMA TAX COMMISSION AND DEPARTMENT OF HUMAN SERVICES
AUTHORIZATION TO DISCLOSE INFORMATION
FOR THE SEED FOR OKLAHOMA KIDS STUDY





Next, follow these steps:

Step 1: Check the spelling of the Study Participant's name.

Step 2: Write the Study Participant's Social Security Number.

Step 3: Check the Study Participant's Date of Birth.

Step 4: The Study Participant must sign and date the form.

Step 5: (Optional) List other names the Study Participant may have used when filing Oklahoma Income Tax returns in the past two years. This is common after getting married, divorced, or re-married.

Step 6: Return the Match Eligibility Form to SEED OK in the enclosed envelope!

The Form can also be mailed to this address:
Oklahoma State Treasurer, State Capitol Building
2300 North Lincoln, Room 217
Oklahoma City, OK 73105-4895

2 How to fill out the Oklahoma College Savings Plan (OCSP) Account Application


The OCSP Account Application opens an account for your child (Your Account). You can use the account to save money for your child's education. Opening an account is quick and easy, and can make a huge impact on your child's future!



It will take 20 minutes to fill out this form.

If you **complete this Application by April 15, 2009**, the State of Oklahoma will deposit \$100 into your OCSP Account. Accounts opened after April 15, 2009 require you to make the \$100 initial contribution.

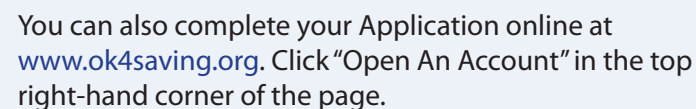
Find your OCSP Account Application, which looks like this at the top:

 SEED for Oklahoma Kids Oklahoma's 529 College Savings Plan	<div style="text-align: right;">JDF</div> Oklahoma College Savings Plan Account Application for an Individual Account Use this form to open a new Plan Account by an Individual <i>Questions?</i> Call toll-free 1-877-654-7284 P.O. Box 8193, Boston, MA 02266-8193 Visit www.ok4saving.org
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These sections must be filled out		These sections are optional	
1	Account Owner Information	3	Contingent Account Owner
2	Beneficiary Information	5	Banking Information
4	Initial Contribution	6	Optional Information
7	Signature and Certification		

Section 1: Account Owner Information

If you select a Contingent Account Owner, you will need this person's name, social security number, birth date, and address.





Section 4: Initial Contribution

4 Initial Contribution

Just follow these simple steps to fund your Account:

- ✓ Select your Investment Option(s) and write the amount to be invested in each option.
- ✓ Check the appropriate box(es) below to indicate how you will make your contribution(s).
- ✓ Call 1-877-654-7284 for assistance, if needed.

Deposit my Initial Contribution in:	Contribution Amounts (See minimums below.)									
Managed Allocation Option	\$									
Diversified Equity Option (2241)	\$									
100% Equity Option (1953)	\$									
Balanced Option (2240)	\$									
Fixed Income Option (2242)	\$									
Guaranteed Option (1954)	\$									
Total Contribution Amount	\$									



Check

(Minimum \$100 to open each Option; \$25 for each subsequent contribution.)

Indicate the amount of your initial contribution amount(s) into the selected Investment Option(s) above and enclose your contribution check(s), payable to the *Oklahoma College Savings Plan*, with this *Account Application*.

In this section, you choose how to invest the money deposited into your OCSP Account.

Step 3: Decide how you'd like to invest. Read the *Investment Options* sheet in your SEED OK green folder.

Step 4: Decide how much to deposit and enter the Contribution Amount. If you open Your Account by April 15, 2009, the State will deposit a \$100 gift—the minimum initial contribution—for you. You may also deposit some of your own money (if you open an account by April 15, you do not need to deposit any money).

To enter your Contribution Amount, choose to:

deposit some of your own
money now

or deposit money later,
if you are able.

- **Write only the amount you are depositing** next to the Investment Option you choose. When selecting one investment option, your initial deposit can be **any amount** for this initial contribution.*
- **Write "100.00"** next to the Investment Option you choose.
- **The \$100 gift will be deposited into Your Account using the Investment Option you select.** This money will be used to open Your Account.
- **Make a check payable to the *Oklahoma College Savings Plan*** in the amount you are depositing.
- **The \$100 gift will be deposited into Your Account using the Investment Option you select.**

*If you select more than one investment option, see the minimum contributions listed in Section 4.

Step 5: Mark the "Check" box.

Many people have questions—and we're here to help!

If you have questions about filling out this section or about SEED OK, please call the Oklahoma State Treasurer's office at 1-866-SEED4OK.

How do I know the best Investment Option for me?

To learn about the Options and decide which one is best for you, please see the *Investment Options* sheet. You can also call a college-savings plan expert at 1-877-654-7284.





Section 5: Banking Information (optional)

5 Banking Information

You must provide the following information if you choose to make your initial investment through Electronic Funds Transfer (EFT) or the Automatic Contribution Plan (ACP), or subsequent contributions through the Electronic Purchase Option. Separate withdrawals from your bank account will be made for each Investment Option you have selected. It may take up to ten days to initiate these options.

You do not need to fill out this section unless you want to. This section allows you to set up an electronic transfer between your bank account and your OCSP Account.

If you choose, you can set up automatic deposits into your OCSP Account (minimum of \$25 per contribution). You can also talk with your employer to set up an automatic transfer from your paycheck to your OCSP Account (minimum of \$15 per contribution).

Section 6: Optional Information (optional)

You do not need to fill out this section unless you want to. This section gives more information to OCSP about you and your family.

Section 7: Signature and Certification

7 Signature and Certification (You must sign this section or this Account will not be opened.)

Signature of Account Owner

Date

I will retain a copy of this Account Application, the Disclosure Booklet and the Participation Agreement (contained in the Disclosure Booklet) with my records.

Step 6: Sign your name and write the date in the space labeled "Signature of Account Owner" and "Date".

Step 7: Return the OCSP Application Form in the enclosed envelope!

The OCSP Application Form can also be mailed to this address:
Oklahoma College Savings Plan
P.O. Box 8193
Boston, MA 02266-8193

Remember!

- To receive the \$100 minimum initial contribution, **you must open your account by the April 15, 2009 deadline!** Mail your OCSP Account Application before this deadline.
- You can also complete your application online by visiting www.ok4saving.org. Click "Open An Account" in the top right-hand corner of the page.
- Once you open your OCSP Account, you may be eligible for a special Savings Match incentive. Your deposits may be matched up to \$250 per year (See *Frequently Asked Questions*).



3 Save money in your Oklahoma College Savings Plan Account

Once Your Account is open, you can save at any time, for as little as \$25 per deposit. You or family and friends can make deposits into this account to celebrate birthdays, holidays, or any special occasion. You can save by:

- ▶ Writing a check and mailing it to OSCP
- ▶ Setting up an Automatic Contribution Plan through your bank
- ▶ Enrolling in Payroll Deduction with your employer

For SEED OK information, please
contact the Oklahoma State Treasurer's office at
1-866-SEED4OK (1-866-733-3465)



or visit www.treasurer.ok.gov and click the
SEED for Oklahoma Kids link.



*a new
year
a new opportunity
to start saving
for your child's
future.*