

# Employers:

## A step-by-step guide to rolling out Ohio's 529 Plan

### 1 Schedule format & date for an information session about Ohio's 529 Plan

Coordinate the session format (live meeting, conference call, or webinar), date, time, and location with your Ohio Tuition Trust Authority representative. Our representative will provide the presentation and marketing materials. Allow one hour for the session which will include a presentation as well as time for questions and answers.

### 2 Inform your employees

Let your employees know about the new benefit and payroll direct deposit option for CollegeAdvantage, Ohio's 529 Plan, by sending out an introductory email (see sample email below).

Consider sending out a reminder email no less than 24 hours prior to the date of the scheduled information session.

#### Sample email:

We would like to roll out a new employee benefit program and payroll direct deposit for Ohio's 529 Plan, CollegeAdvantage.

*(Insert name of staff)* will work with a representative at the Ohio Tuition Trust Authority to help educate our employees about CollegeAdvantage and establish their direct deposit. We will be providing *(insert session format)* for employees to learn more about Ohio's 529 Plan—its features and benefits.

We are pleased to provide this voluntary benefit elective as a commitment to our employees' financial health, and provide payroll direct deposit for those with a new or existing 529 account.

For those interested, an information session will be held on *(insert session date, time & location)*.

We encourage your participation.



### 3 Make sure benefit logistics are in place

List CollegeAdvantage on employee benefit information. Include our website **CollegeAdvantage.com** and our phone number **1-800-AFFORD-IT (233-6734)**. We will provide administrative support so you do not have to shoulder any of the questions.

Ensure payroll is aware of this new employee benefit and are familiar with the 529 payroll direct deposit form.

Although you can create your own payroll direct deposit form, our process offers account owners a printed form after they sign up for their 529 account on our website. Using this form will ensure accuracy of information for direct deposit.

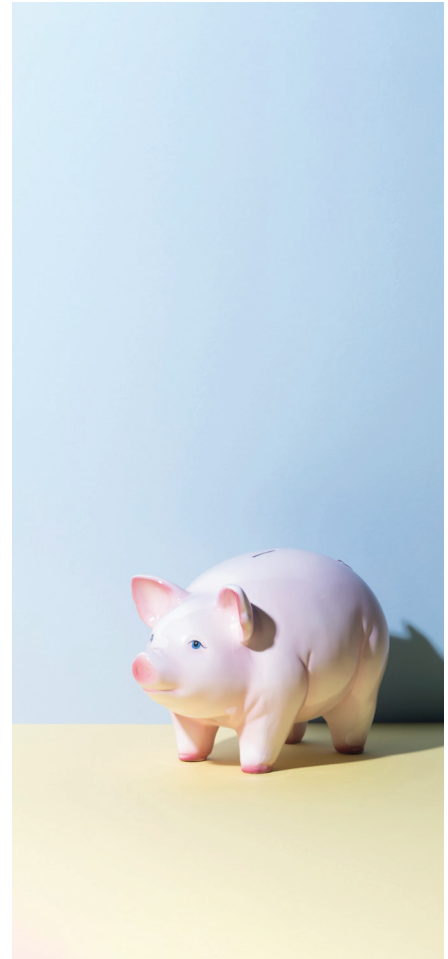
### 4 Receive & share ongoing content about Ohio's 529 Plan.

Communication content is geared for both those who already have 529 plans and those who have yet to sign up. Monthly communications will be in the form of blogs, emails, and web links that you can share with your employees.

### 5 Include us at your annual benefit fair

Include us at wellness events and benefit fairs for continued support.

At any time, you can request any of our marketing materials and representation for lunch-and-learns.



#### Contact

##### Janet Smith

Marketing Representative – Employers  
Ohio's 529 Plan, CollegeAdvantage

(614) 387-5426

[jsmith@CollegeAdvantage.com](mailto:jsmith@CollegeAdvantage.com)

[CollegeAdvantage.com](http://CollegeAdvantage.com)

# 529