

## Frequently Asked Questions about the CBIZ 529 plan

**Question:** Who is the record keeper of the CBIZ 529 plan?

**Answer:** AllianceBernstein

**Question:** How do I enroll?

**Answer:** Log onto <https://corporate.collegeboundfund.com> >select company as your ID type> User ID: **CBIZ** password: **CBIZ529**. You will be prompted to enter a personal user ID and password, please keep this password for your future reference. Finally, click on “Open Account/Enrollment” and follow the instructions given.

**Question:** Do I have to send in any enrollment paperwork to the record keeper?

**Answer:** Once you have completed the online enrollment process, print and sign two copies of the enrollment confirmation. Please keep one for your records and return the other to CollegeBound *fund*. Your account will not be activated until CollegeBound *fund* receives your signed original Enrollment Confirmation. Mailing information is on the form.

**Question:** When will my paycheck first be impacted?

**Answer:** CBIZ is notified by AllianceBernstein to establish a Direct Deposit notice in your payroll account. If you do not see the direct deposit being (on your paystub) within four weeks of mailing your enrollment form to AB, please contact the Employee Service Center at 1-877-227-4372.

**Question:** How do I make changes to my election?

**Answer:** Please call the record keeper, AllianceBernstein, to make any changes to your election.

**Question:** When can I make changes to my election?

**Answer:** You can start or stop your 529 contributions at anytime by calling the record keeper directly.

**Question:** How do I contact the record keeper?

**Answer:** Please call AllianceBernstein directly at 1-800-227-2900