

Enrolling a 529 Plan:

1. Complete and sign the 529 enrollment form. The Port's advisors, Scott Sutherland and Thomas Wolfson of Wells Fargo Advisors, can be listed as financial advisors on the form, or you may choose your own representative.

The necessary information for the advisors are:

Dealer #: 00141 Branch #:PSDC Dealer Name: Wells Fargo Advisors

Rep. #: PSD3 Rep. Name: Scott Sutherland and Thomas Wolfson

Mailing Address: 11682 El Camino Real Suite 305
San Diego, CA 92130

Telephone: 877-524-4015 Fax: 858-523-7997

Email: scott.sutherland@wellsfargoadvisors.com

2. Fax or mail the completed application to Fidelity. On the fax coversheet or with the mailing, request an account set up confirmation and provide your name and a phone number Fidelity can reach you at.

2.1. Fax number: 1-888-321-7349

2.2. Mailing address:

The ScholarShare Advisor College Savings Plan

Fidelity Investments Institutional Operations Company, Inc. (FIIOC)

P.O. Box 770002

Cincinnati, OH 45277-0086

3. When verification is received from Fidelity, note when it was received and provide this and the direct deposit form to payroll to begin withdrawals.

*For assistance with account set up, Fidelity can be reached at 1-800-248-4253.