

Fidelity 529 Plan Checklist



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A step-by-step guide to help you save for college.

529 plans can be powerful tools if you know how to use them. Follow these four simple steps — from learning the basics to opening, funding, and managing your account.

More resources are available at www.Fidelity.com/college

	What should I do?	How can Fidelity help?
<input type="checkbox"/> Learn the basics	Understand how 529 plans work and how they compare to other savings options. Make sure a 529 plan makes sense for you.	<ul style="list-style-type: none">• Compare your college savings options• Use the college planner to build a plan• Watch a video about 529 plans
<input type="checkbox"/> Find a plan	Consider your home state's plan first. But you can also invest in most states' plans. Fidelity manages plans for Arizona, California, Delaware, Massachusetts, and New Hampshire.	<ul style="list-style-type: none">• Compare different 529 plans• Calculate your state tax benefits• Learn about Fidelity Managed 529 Plans
<input type="checkbox"/> Choose an investment strategy	You can invest your 529 plan contributions in a wide range of investment options, including an Age-Based Strategy or a Custom Strategy. Decide which strategy works best for you.	<ul style="list-style-type: none">• Review your investment options• Monitor plan performance
<input type="checkbox"/> Open a 529 account	Open and fund your 529 account. Contribute an initial investment, or establish periodic contributions from your bank or your Fidelity brokerage or mutual fund account.	<ul style="list-style-type: none">• Open a Fidelity Managed 529 Account online• Request an enrollment kit• Find useful forms for managing your account

Please carefully consider the Plan's investment objectives, risks, charges, and expenses before investing. For this and other information on any 529 college savings plan managed by Fidelity, call or write to Fidelity for a free Fact Kit, or [view one online](#). Read it carefully before you invest or send money.

*The UNIQUE College Investing Plan, U.Fund College Investing Plan, Delaware College Investment Plan, Fidelity Arizona College Savings Plan, and ScholarShare College Savings Plan are offered by the state of New Hampshire, MEFA, the state of Delaware, the Arizona Commission for Postsecondary Education, and the ScholarShare Investment Board, an agency of the state of California, respectively, and managed by Fidelity Investments. If you or the designated beneficiary is not a New Hampshire, Massachusetts, Delaware, Arizona, or California resident, you may want to consider, before investing, whether your state or the beneficiary's home state offers its residents a plan with alternate state tax advantages or other benefits.

Units of the portfolios are municipal securities and may be subject to market volatility and fluctuation.