

Tomorrow's Scholar[®] Group 529 Plan

...connecting to the future

Saving for College is as Easy as 1, 2, 3

College is the #2 saving goal after retirement. And one of the smartest and easiest ways to save for education is through a 529 college savings plan. Your employer has made it easy for you to save through a group plan with convenient monthly contributions from your bank account.

Follow these three easy steps to enroll in the plan and get started:

Step 1: Watch the short [enrollment video](#) to learn more about 529 college savings plans

Step 2: Complete a Tomorrow's Scholar 529 Account Application and Master Services Agreement

- Before you begin, have the beneficiary's date of birth and social security number
- Go to www.tomorrowsscholar.com/groupplans
- Enter Sorrento's group plan number: **376**
- Click on "Download Application" and download "Master Services Agreement" on the right.
- Follow the instructions and complete the account application and Master Services Agreement
- Be sure to provide banking information for monthly automatic bank draft in Section 7 of the account application
- Download the Rollover Form *only* if you are rolling assets from another 529 plan or UGMA/UTMA
- You can review details of the Tomorrow's Scholar program by accessing the Program Description at www.tomorrowsscholar.com.

Step 3: Print and return the Account Application and the Master Services Agreement (pages 1 and 2 only) to your Plan's Investment Professional

- Your plan's investment professional is here to help, including help with rollovers. You can contact her at the number below for questions on 529 college savings and investing:

Melissa Marin
Director of Retirement Plan Services
Manning/Corder (MWM Retirement)
401 B Street, Suite 2300
San Diego, CA 92101
Contact number: 619-237-9977, ext 305

- Keep a copy of the application and Master Services Agreement for your records
- You will receive a confirmation via the mail once your Tomorrow's Scholar 529 account is established

For additional information on Tomorrow's Scholar,
visit TomorrowsScholar.com or contact the Plan's financial professional.

