Let’s get started!

JUST LIKE YOU, the Oklahoma College Savings Plan and SEED for Oklahoma Kids know your child has a bright future. That’s why we make it easy to start saving for college now.

To sign up for SEED OK, you will need to fill out and mail two forms located in your SEED OK green folder. The directions in this booklet help you fill out these forms.

Questions? Read the Answers to Frequently Asked Questions or call us.
1 How to fill out the Match Eligibility Form:

Returning the Match Eligibility Form gives the State of Oklahoma permission to share the following information with the State Treasurer’s Office:

- Adjusted Gross Income (from 2007-2009 tax returns)
- Public benefits receipt (such as Food Stamps, Medicaid, or Temporary Assistance to Needy Families)

The State Treasurer’s Office will use this information to see if you qualify for the Savings Match. Your information is confidential and will not be shared. They will use it only to determine if you qualify for the Savings Match.

If you qualify, SEED OK will match the deposits you make to your child’s Oklahoma College Savings Plan account, up to $250 per year. By receiving this Savings Match, you may be able to double the amount of money you’re saving for your child’s education.

You must fill out and return this form to receive the Savings Match into your child’s SEED OK account.

It will take 5 minutes to fill out this form.

Find your Form, which look like this at top:

2 Complete, sign, and mail the Oklahoma College Savings Plan (OCSP) Account Application ..............page 4

Time it takes: 20 minutes

Why do it? Opens an account for your child where you can deposit money. Act by April 15, 2009 and the state will provide the $100 initial deposit for you!

- Fill out the OCSP Account Application, either on paper or online
- Mail it to OCSP in the postage paid envelope (paper version only)

3 Save money in your Oklahoma College Savings Plan Account! ........ page 11

Time it takes: 5 minutes every time you do it

Why do it? Save money for your child’s education, plus you may qualify to have your savings matched.

- You, or family and friends, can deposit money into this account as often as you want.

Checklist

1 Complete, sign, and mail the Match Eligibility Form .....................................................page 2

Time it takes: 5 minutes

Why do it? Allows Oklahoma to check if you qualify for a Savings Match

- Fill out the Match Eligibility Form
- Mail it to SEED OK in the stamped envelope
Next, follow these steps:

Step 1: Check the spelling of the Study Participant’s name.

Step 2: Write the Study Participant’s Social Security Number.

Step 3: Check the Study Participant’s Date of Birth.

Step 4: The Study Participant must sign and date the form.

Step 5: (Optional) List other names the Study Participant may have used when filing Oklahoma Income Tax returns in the past two years. This is common after getting married, divorced, or re-married.

Step 6: Return the Match Eligibility Form to SEED OK in the enclosed envelope!

The Form can also be mailed to this address:
Oklahoma State Treasurer, State Capitol Building
2300 North Lincoln, Room 217
Oklahoma City, OK 73105-4895

2 How to fill out the Oklahoma College Savings Plan (OCSP) Account Application

The OCSP Account Application opens an account for your child (Your Account). You can use the account to save money for your child’s education. Opening an account is quick and easy, and can make a huge impact on your child’s future!

It will take 20 minutes to fill out this form.

If you complete this Application by April 15, 2009, the State of Oklahoma will deposit $100 into your OCSP Account. Accounts opened after April 15, 2009 require you to make the $100 initial contribution.

Find your OCSP Account Application, which looks like this at the top:

<table>
<thead>
<tr>
<th>These sections must be filled out</th>
<th>These sections are optional</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Account Owner Information</td>
<td>3 Contingent Account Owner</td>
</tr>
<tr>
<td>2 Beneficiary Information</td>
<td>5 Banking Information</td>
</tr>
<tr>
<td>4 Initial Contribution</td>
<td>6 Optional Information</td>
</tr>
<tr>
<td>7 Signature and Certification</td>
<td></td>
</tr>
</tbody>
</table>
Next, follow these steps:

**Section 1: Account Owner Information**

<table>
<thead>
<tr>
<th>Account Owner Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>You must provide all requested information.</td>
</tr>
<tr>
<td>The Account Owner must be a U.S. citizen or resident alien, and must have a Social Security Number or Taxpayer Identification Number.</td>
</tr>
<tr>
<td>The Account Owner cannot be a minor. You must provide a residential address or this Account cannot be opened.</td>
</tr>
</tbody>
</table>

**Step 1:** Write the Account Owner’s name.

The Account Owner **must** be the person who completed the SEED OK study phone interview and is listed in your SEED OK green folder.

**Section 2: Beneficiary Information**

<table>
<thead>
<tr>
<th>Beneficiary Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>You must provide all requested information.</td>
</tr>
<tr>
<td>The Beneficiary must be a U.S. citizen or resident alien, and must have a Social Security Number or Taxpayer Identification Number. You must provide a residential address or this Account cannot be opened.</td>
</tr>
</tbody>
</table>

**Step 2:** Write the Beneficiary’s name.

The Beneficiary **must** be the child selected to be part of the SEED OK study and is listed in your SEED OK green folder.

**Section 3: Contingent Account Owner (optional)**

You do not need to fill out this section unless you want to. This section allows you to choose a person to become the account owner in case something happens to you.

If you select a Contingent Account Owner, you will need this person’s name, social security number, birth date, and address.

You can also complete your Application online at [www.ok4saving.org](http://www.ok4saving.org). Click “Open An Account” in the top right-hand corner of the page.
Section 4: Initial Contribution

In this section, you choose how to invest the money deposited into your OCSP Account.

Step 3: Decide how you’d like to invest. Read the Investment Options sheet in your SEED OK green folder.

How do I know the best Investment Option for me?

To learn about the Options and decide which one is best for you, please see the Investment Options sheet. You can also call a college-savings plan expert at 1-877-654-7284.

Step 4: Decide how much to deposit and enter the Contribution Amount. If you open Your Account by April 15, 2009, the State will deposit a $100 gift—the minimum initial contribution—for you. You may also deposit some of your own money (if you open an account by April 15, you do not need to deposit any money).

To enter your Contribution Amount, choose to:

- deposit some of your own money now
- deposit money later, if you are able.

- Write only the amount you are depositing next to the Investment Option you choose. When selecting one investment option, your initial deposit can be any amount for this initial contribution.*
- Make a check payable to the Oklahoma College Savings Plan in the amount you are depositing.
- The $100 gift will be deposited into Your Account using the Investment Option you select. This money will be used to open Your Account.

*If you select more than one investment option, see the minimum contributions listed in Section 4.

Step 5: Mark the “Check” box.

Many people have questions—and we’re here to help!

If you have questions about filling out this section or about SEED OK, please call the Oklahoma State Treasurer’s office at 1-866-SEED4OK.
Section 5: Banking Information (optional)

You do not need to fill out this section unless you want to. This section allows you to set up an electronic transfer between your bank account and your OCSP Account.

If you choose, you can set up automatic deposits into your OCSP Account (minimum of $25 per contribution). You can also talk with your employer to set up an automatic transfer from your paycheck to your OCSP Account (minimum of $15 per contribution).

Section 6: Optional Information (optional)

You do not need to fill out this section unless you want to. This section gives more information to OCSP about you and your family.

Section 7: Signature and Certification

Step 6: Sign your name and write the date in the space labeled “Signature of Account Owner” and “Date”.

Step 7: Return the OCSP Application Form in the enclosed envelope!

The OCSP Application Form can also be mailed to this address:
Oklahoma College Savings Plan
P.O. Box 8193
Boston, MA 02266-8193

Remember!

• To receive the $100 minimum initial contribution, you must open your account by the April 15, 2009 deadline! Mail your OCSP Account Application before this deadline.

• You can also complete your application online by visiting www.ok4saving.org. Click “Open An Account” in the top right-hand corner of the page.

• Once you open your OCSP Account, you may be eligible for a special Savings Match incentive. Your deposits may be matched up to $250 per year (See Frequently Asked Questions).
Save money in your Oklahoma College Savings Plan Account

Once Your Account is open, you can save at any time, for as little as $25 per deposit. You or family and friends can make deposits into this account to celebrate birthdays, holidays, or any special occasion. You can save by:

- Writing a check and mailing it to OCSP
- Setting up an Automatic Contribution Plan through your bank
- Enrolling in Payroll Deduction with your employer

For SEED OK information, please contact the Oklahoma State Treasurer’s office at 1-866-SEED4OK (1-866-733-3465) or visit www.treasurer.ok.gov and click the SEED for Oklahoma Kids link.

a new year a new opportunity to start saving for your child’s future.