



GETTING STARTED CHECKLIST

Financial Institutions and 529 Sponsors

PREPARATION

- Gain approval from one or more schools to implement a School Saving program.
- Meet with school principal or PTA/PTO to select school Volunteers to manage program at the school.
 - Determine day of week for Deposit Day.
 - Determine when and where depositing will take place.
 - Determine where student funds will be deposited. (FDIC-insured institution)
- Plan/advertise FIRST DEPOSIT DAY contest with public relations and marketing departments.

NOTIFY SCHOOL SAVINGS™

- Email support@schoolsavings.com or call 888-787-7728.
- Receive Registration and Login credentials.

THREE WEEKS BEFORE FIRST DEPOSIT DAY

- Send Enrollment information home. **Announce First Deposit Day contest.**
- Open student savings accounts or provide 529 Account enrollment link to parents.
- Instruct parents to register their young savers at www.schoolsavings.com or...
- Have bankers/volunteers register students online.
- Set-up electronic deposit processing with School Savings™.

LAUNCH FIRST DEPOSIT DAY!



Getting Started with Schools Savings™

"Our PTA parents and our teachers were excited and supportive from the very beginning...the use of the Internet is helping teach our kids about the new era in banking technology."

--T. Sidlowski
Parent Volunteer
Auburn, WA

"We have certainly enjoyed this project, and some day hope to expand to other schools within the district."

--William R. White
Chairman and President
Dearborn Federal Savings Bank,
Dearborn, MI

"It's important because I need to know to save money so when I grow up I can use it the right way"

--D. Green
Student
Setauket Elementary

To begin School Savings in your school...

The School

- Communicates with parents regarding program
- Invites volunteers or staff to coordinate program
- Provides access to an Internet-ready computer once weekly, either before class or during lunch

The School Volunteers

- Learn to use deposit software
- Manage weekly Deposit Day
- Deliver student deposits to the designated depository institution.

The Financial Institution or 529 sponsor

- Sponsors the program at the school
- Provides student incentives for deposits
- Becomes an active "Partner in Education" with school

School Savings™ - www.schoolsavings.com TEL:

888-787-7728 | FAX: 888-760-4008

support@schoolsavings.com