

Program Fees

Type of Fee	Amount
Account Fees	
Paper Enrollment Form Fee (<i>non-refundable</i>) We only charge this fee for mailed paper enrollment forms. Additionally, if you open more than two Accounts for Students living at the same home address, we will waive all future enrollment fees for Students living at that address (accounts that have been refunded, canceled, or rolled over to another 529 plan are not included as eligible Accounts).	Paper Enrollment Form: \$50 Online Enrollment Form: N/A*
Late Payment Fee For Custom Monthly Plans, all payments are due on the 15th day of each month. We will post a late fee to your Account if we do not receive your monthly payment by the 10th day following the due date.	\$10
Dishonored Payment Fee (Automatic withdrawal, electronic payments, and checks)	\$25 or actual fee charged by the bank, whichever is greater
Refund Fees	
Program Refund Penalty For all Refunds except in the event of death, disability, Scholarship, attendance at a U.S. service academy, or graduation/completion of a degree or certificate.	10% of earnings or \$100, whichever is greater
Account Cancellation Fee (<i>assessed on Refunds only</i>)	\$10
Account Maintenance Fee (<i>assessed on Refunds only</i>)	\$1.70 per month that the account was open and active
For Organizations	
Scholarship Set-up Fee (<i>non-refundable</i>)	\$100 per master account
Student Account Transfer Fee Assessed each time the Organization transfers Units from the master Account to a named Student Account (per Student Account).	\$25

**Prior to November 1, 2017, we charged the \$50 enrollment fee for online enrollments.*