



Questions?

 **Customer Service:**
 (877)424-4377
 Monday through Friday,
 8:00 AM - 8:00 PM ET

 **Website:**
www.path2college529.com

2412 Uma Maheswara Rao Pallapolu
 505 morgan bay CT
 Suwanee GA 30024-3857

Account Profile - New

Confirmation Date

March 14, 2023

Account Owner	Beneficiary	Account #	Account Type
Uma Maheswara Rao Pallapolu	Vishnu Srivastav Pallapolu	981834068-01	Individual 529

Account Owner

Name	Uma Maheswara Rao Pallapolu	Primary Phone	(479) 306-1939
Mailing Address	505 morgan bay CT Suwanee GA 30024		
Email	umarao.qe@gmail.com		

Notification Information

Email Address umarao.qe@gmail.com

Delivery Method

Quarterly Statements and Plan Description Updates	Notify by email for all online statements/updates
Transaction and Profile Confirmations	Notify by email
Tax Forms	Notify by email

Beneficiary

Name	Vishnu Srivastav Pallapolu	Birth Date	09/11/2009
Mailing Address	505 morgan bay CT Suwanee GA 30024		

Successor Owner

Name	Sailaja Kata	Business Phone	(479) 306-1939
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Investment Allocations

Portfolio Name	Allocation Percentage *
2026/2027 Enrollment Portfolio	100%

* Investment allocations are effective for all future contributions and do not necessarily reflect the current allocation of assets in your account.

Bank Information

Bank Name BANK OF AMERICA,
Routing Number 072000805
Bank Account Number *****0954
Account Type Checking
Bank Phone
Account Owner Name sailaja kata

Funding Information

Instruction Type Electronic Bank Transfer (EBT)
Bank BANK OF AMERICA,/*****0954
Amount \$8,000.00
Begin Date 03/11/2023
Frequency One-Time
Debit Date* 14

* If the debit date falls on a weekend or holiday, your account will be debited on the following business day.

Investment Summary As of 03/13/2023

Portfolio Name	Units	Unit Price	Value
2026/2027 Enrollment Portfolio	699.9125	\$11.43	\$8,000.00
Total Portfolio Net Worth:			\$8,000.00

Investment Transactions

Trade Date	Portfolio Name	Units Transacted	Unit Price	Transaction Amount	Transaction Description
03/13/2023	2026/2027 Enrollment Portfolio	699.9125	\$11.43	\$8,000.00	Contribution EFT

Before you invest, consider whether your or the beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in that state's qualified tuition program.

For more information about the Path2College 529 Plan ("the Plan"), call 1-877-424-4377, or visit Path2College529.com to obtain a Plan Description, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing.

The Plan is administered by the Board of Directors of the Georgia Higher Education Savings Plan.

The Plan's Portfolios invest in mutual funds and/or a funding agreement. Investments in the Plan are municipal securities that will vary with market conditions. Investments are not guaranteed or insured by the State of Georgia, the Georgia State Treasurer, the Georgia Higher Education Trust Fund, the Board of Directors of the Georgia Higher Education Savings Plan, the Plan, the Federal Deposit Insurance Corporation nor any other government agency or entity, nor any of the service providers of the Plan.

TIAA-CREF Tuition Financing, Inc., Plan Manager. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the Path2College 529 Plan.





Contribute to your Path2College 529 Plan account online at Path2College529.com

Check this box if this contribution is an "indirect rollover" from another state's 529 plan, Coverdell Education Savings Account, or a qualified U.S. Savings Bond. See reverse for further instructions.



* 98183406801 *

Account Owner Uma Maheswara Rao Pallapolu
Beneficiary Vishnu Srivastav Pallapolu
Account Number 981834068-01
Amount Enclosed

□□□□,□□□□.□□□ Contribution

□□□□,□□□□.□□□ Rollover (Principal)

□□□□,□□□□.□□□ Rollover (Earnings)

Make checks payable to Path2College 529 Plan

Accounts in the Path2College 529 Plan are not insured by the State of Georgia and neither the principal deposited nor the investment return is guaranteed by the State of Georgia.



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- **529 Plan Assets** (held in another state's plan): Provide an account statement issued by the state's 529 program which shows the earnings or loss portion of your withdrawal.
- **Coverdell Education Savings Account:** Provide an account statement or documentation issued by the account custodian that shows the basis and earnings in your account.
- **U.S. Savings Bond:** Provide an account statement or IRS Form 1099-INT from the redeeming institution that shows the interest which has accrued on the bond.

Please note your contributions will be allocated according to your most recent investment allocation instructions.

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