

Distribution Guide for Colleges and Universities

With your CHET account, you can pay a college or university directly using BillPay or transfer funds to your linked bank account or Fidelity account. Here's how:

Pay a school directly through BillPay:

- Log in to your account and access BillPay by clicking the "Pay Bills" Tab or select "Accounts and Trade" and then "BillPay"
 - (if applicable): Enroll your CHET account in BillPay.
- If already on the 529 account landing page, you may click the "Pay an Educational Expense" link in the Money Movement section.
- Choose your CHET account from the drop-down menu and click "Add a Payee"
- Next, click "Add a School or company" and type in the name of the college or university you wish to pay
 - Note: If your college or university does not prefill, choose "Add a school or company manually" and complete the required fields
- Now that you have added your school or university as a standing payee, return to the Payment Center and enter the dollar amount of your payment and the date you wish the payment to be delivered by and click "Review payments"
 - Review the details of your payment and, if they are accurate, click "Submit payments".
 - Note: in most cases a physical check will be mailed to your school or university.

Transfer funds to your linked bank account or Fidelity account:

- Log in to your account and highlight the 529 account to ensure you are on the 529 account landing page.
- In the Money Movement section of the page, select "Add money/withdraw from my account" and then select "Take a 529 withdrawal" and follow the prompts:
 - Select which account you want to *move money from*
 - Select where the money will be *transferred to (destination account)*; an existing Fidelity account, linked bank account, or a new bank account (to be added).
 - Once you have chosen the destination account, or added a new bank account, enter the dollar amount you wish to transfer, then click "Continue"
 - Review your transfer details. If they are accurate, click "Submit"

Note: Your transfer is now submitted. You will see the funds leaving your CHET account within one business day.

If you need assistance with paying a college or university, or have any other questions related to your CHET account you can reach us by phone at 888-799-CHET (2438). We recommend calling while our 529 or College Savings plan specialists are available, Monday–Friday from 8 a.m. to 9 p.m. ET.

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