

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 "Accounts and Trade" and then "BillPay"
 - (if applicable): Enroll your CHET account in BillPay
- Choose your CHET account from the drop-down menu and click "Add a Payee"
- Next, click "Add a 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 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 access the Portfolio Summary page by clicking "Accounts and Trade" and then "Portfolio", then select your CHET account on the left side of the screen
- In the "I want to" section of the page, select "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 education planning specialists are available, Monday–Friday from 8 a.m. to 9 p.m. ET.