



# NC ALE PROGRAM

## ENROLLMENT CHECKLIST



Enjoy tax-advantaged savings that do not impact current benefits



Choose options that fit your goals and comfort level.



In about 15 minutes, you can easily open an account online.

### Here's what you will need to open an NC ALE Account.

Identifying Pieces of information:

- ☐ Name, Address & Date of Birth
- ☐ Social Security Number
- ☐ Bank Account Information (optional)
- ☐ Driver's License, State Issued or Military ID (if selecting a checking account)
- ☐ Identify the basis of eligibility through an easy, online self-certification process.
- ☐ Select your account type and investments. You will select one or more investment option and assign a percentage to each account selected for a total of 100%.

If you are a guardian, parent, sibling or other authorized person opening an account for someone else, you will need to provide the four identifying pieces of information for you and the account owner. You will also need to upload or mail authorizing documentation.

Learn about the investment options available at  
[ncable.nc.gov/getting-started-nc-able/investment-options](https://ncable.nc.gov/getting-started-nc-able/investment-options)

- ☐ How would you like to fund your account? (minimal initial contribution is \$25)
  - Automatic and regular contributions from your bank account.
  - Deposit from my paycheck. (A form will print at the end of the online registration.)
  - A single deposit from your bank account.
  - Send a check deposit.
- ☐ Username, password and three security question answers.

**Have questions or need assistance?**  
**Call (888) 627-7503**