

How to Claim Your College Savings Account



Use this guide to claim your child's College Savings Account, create your login, and connect eligible savings accounts in the CSA Online Portal.

Before you begin, have your student's ZIP code, birthdate, and Drew student email address ready. You will also need the personal email address you want to use for future logins.

All Drew students have a school email address, which is usually firstname.lastname@drewschools.org. If that email does not work or if you are not sure what your student's email is please contact Drew Charter school and request their student email address.

Step 1: Go to the [CSA Online Portal](#) or https://www.vistashare.com/p/east_lake/csa-online-portal/login/

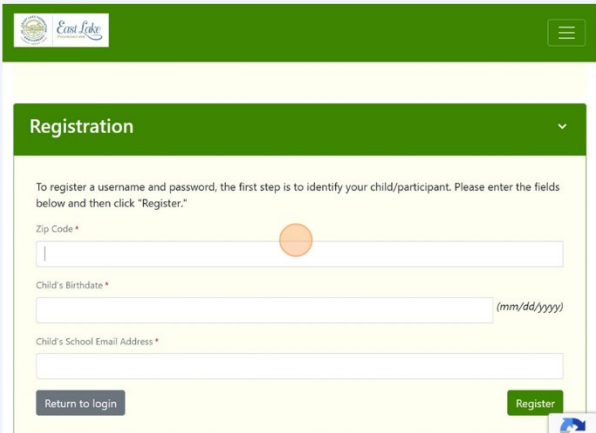
- **Bookmark the website so you can easily log in later to check your child's account.**

A screenshot of the 'Login' page for the CSA Online Portal. The page has a green header with the word 'Login' and a dropdown arrow. Below the header, it says 'Welcome to the CSA Online Portal portal.' There are two input fields: 'Email address' and 'Password'. Below the password field is a checkbox labeled 'Remember me'. At the bottom left, there is a link 'Forgot your password?' and a 'Register...' button. At the bottom right, there is a green 'Log in' button. A large blue arrow points from the left towards the 'Register...' button.

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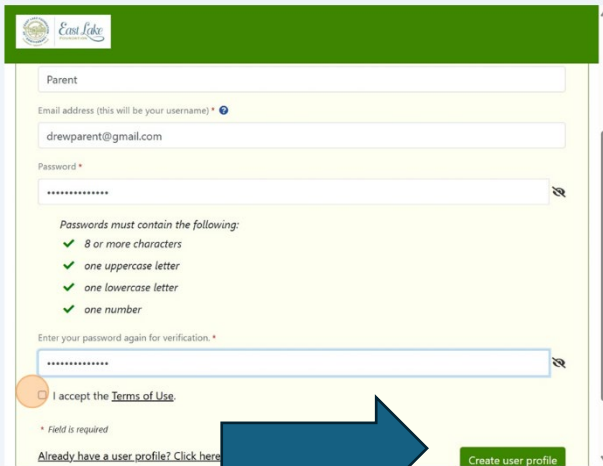
Step 2: Enter your student's information. ZIP code, birthdate, and Drew student email address to verify their identity. Enter the email address in lowercase letters.

2 Click the "Zip Code **" field.



The registration form is titled "Registration" and includes the following fields: "Zip Code **", "Child's Birthdate *" (with a "(mm/dd/yyyy)" format hint), and "Child's School Email Address *". There are "Return to login" and "Register" buttons at the bottom. A blue arrow points to the "Child's School Email Address *" field.

Step 3: Create your user account for future logins. Enter your first and last name and your personal email address. Please enter your email address in lowercase.



The user creation form includes the following fields: "Parent", "Email address (this will be your username) *" (pre-filled with "drewparent@gmail.com"), "Password *" (with a strength indicator), and "Enter your password again for verification. *". Below the password fields are password requirements: "8 or more characters", "one uppercase letter", "one lowercase letter", and "one number". There is a checkbox for "I accept the Terms of Use" and a "Create user profile" button. A blue arrow points to the "Create user profile" button.

If your student email address pre-populates for username or email, please delete it and type in your personal email.

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Step 4: After you enter your information, click Create User Profile. Use this email address and password whenever you return to check your student's account.

The screenshot shows the East Lake Foundation website interface. At the top, there is a green header with the East Lake Foundation logo on the left and navigation links on the right: a mail icon, a user icon, the email address kwilliams@eastlakefoundation.org, and a "Log out" link.

The main content area is divided into two columns. The left column is titled "My Info" and contains a form with the following fields: Name (with a blue box), Email (with a blue icon and "(None)"), Address (with "(None), (None), (None)"), Home (with "(None)"), Cell (with "(None)"), and Work (with "(None)"). A large blue arrow points from the "Update" button at the bottom right of this section towards the right column.

The right column contains a welcome message: "We are thrilled to have you and your child as part of the Wealth Builds Child Savings Account (CSA) - a powerful tool designed to help you save for your child's education. Funds can be used for tuition, fees, books, supplies, computer equipment, and certain room and board expenses at two- and four-year colleges, trade schools, apprenticeship programs, and postgraduate courses. We're excited to support your child's educational journey and help build a solid foundation for their financial success."

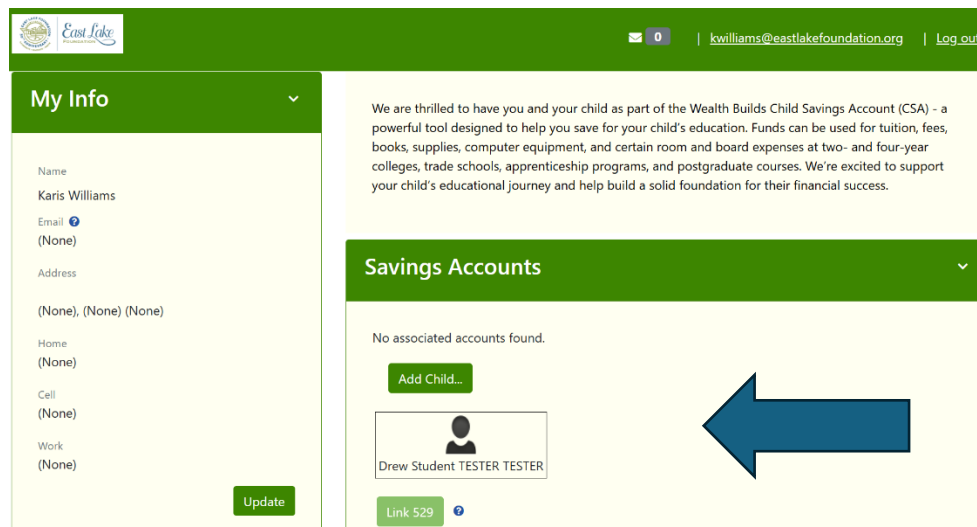
Below the message is a section titled "Savings Accounts" with a dropdown arrow. It states "No associated accounts found." and includes an "Add Child..." button. Below this is a user profile card for "Drew Student TESTER TESTER" with a person icon. At the bottom of the card is a "Link \$29" button with a blue icon.

Once you have completed registering you will be directed to your home page that will look like the below.

The "Savings Account" section (bottom left) shows your child's account. If you have a 529 account, the \$500 will appear within 3–6 business days after claiming.)

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Step 5: Click on the Update button to the left under **My Info** to enter your address and additional information.



The screenshot shows the East Lake Foundation website interface. On the left, under the 'My Info' tab, there is a form with fields for Name (Karis Williams), Email (None), Address (None), Home (None), Cell (None), and Work (None). An 'Update' button is at the bottom right of this section. On the right, under the 'Savings Accounts' tab, there is a message: 'We are thrilled to have you and your child as part of the Wealth Builds Child Savings Account (CSA) - a powerful tool designed to help you save for your child's education. Funds can be used for tuition, fees, books, supplies, computer equipment, and certain room and board expenses at two- and four-year colleges, trade schools, apprenticeship programs, and postgraduate courses. We're excited to support your child's educational journey and help build a solid foundation for their financial success.' Below this, it says 'No associated accounts found.' and there is an 'Add Child...' button. A large blue arrow points from the 'Add Child...' button towards the 'Link 529' button at the bottom. The 'Link 529' button is located below a profile card for 'Drew Student TESTER TESTER'.

Step 6: The Savings Account on the bottom left will show your child's saving account. If you have a 529 account, you can click **Link 529** to link these accounts and view how they grow on your own home page.

If you do not have a 529 account you can click Link 529 and it will guide you on how to create one.

1. Click Link 529 to connect accounts and track growth on your homepage (Will only link to Georgia 529 accounts)

- **An additional \$25 will be deposited to account who link a 529 account.**

Claiming CSAs for other children:

- If you have other children who are eligible for a CSA. Click Add Child to include any other eligible children in your household.