



my529[®] Utah's educational savings plan

Mission and vision

MISSION

my529 helps families save for education.

OUR VISION

Make my529 the nation's plan of choice for families investing for education and an organization in which employees take pride.

Strategic plan priorities

Account Growth - my529 accounts will be as ubiquitous as 401(k) accounts.

our529 Culture - my529 is a culture of excellence, kindness, inclusion and respect. It is among the best places to work in Utah.

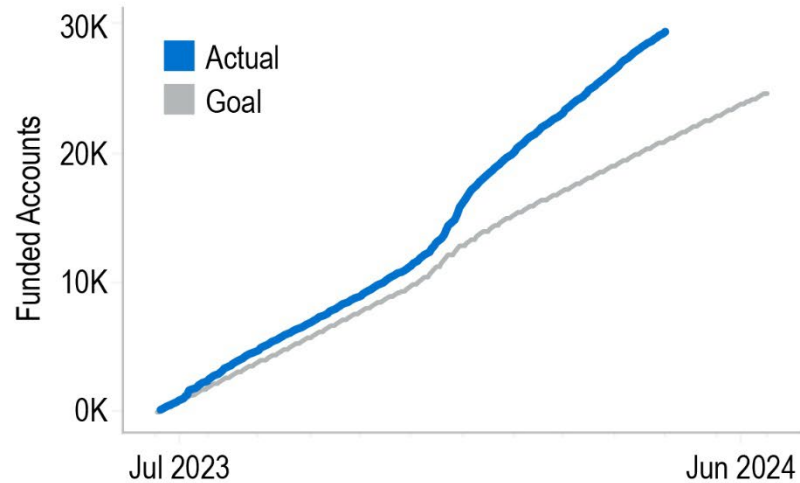
Account Owner Experience - my529 curates the best account owner experience so they become our ambassadors.

Account growth metrics

my529 accounts will be as ubiquitous as 401(k) accounts.

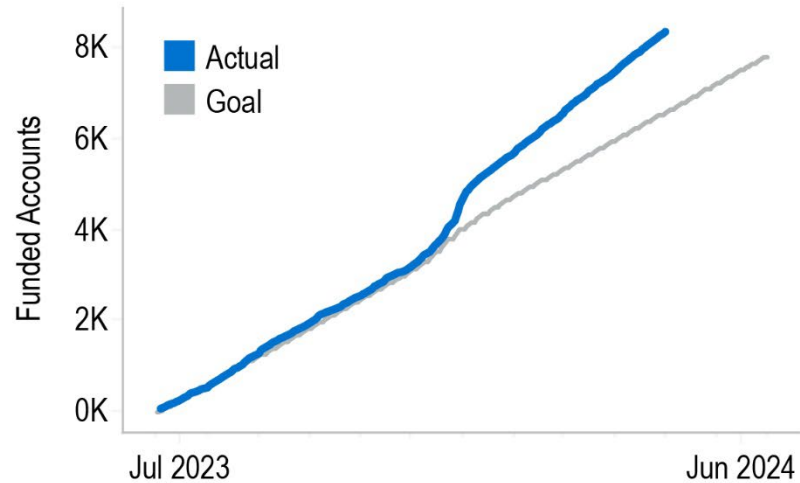
Nonresident Accounts

24,700 Annual Goal **29,488** YTD Accounts Tracking 40.4% Higher Than Goal



Utah Resident Accounts

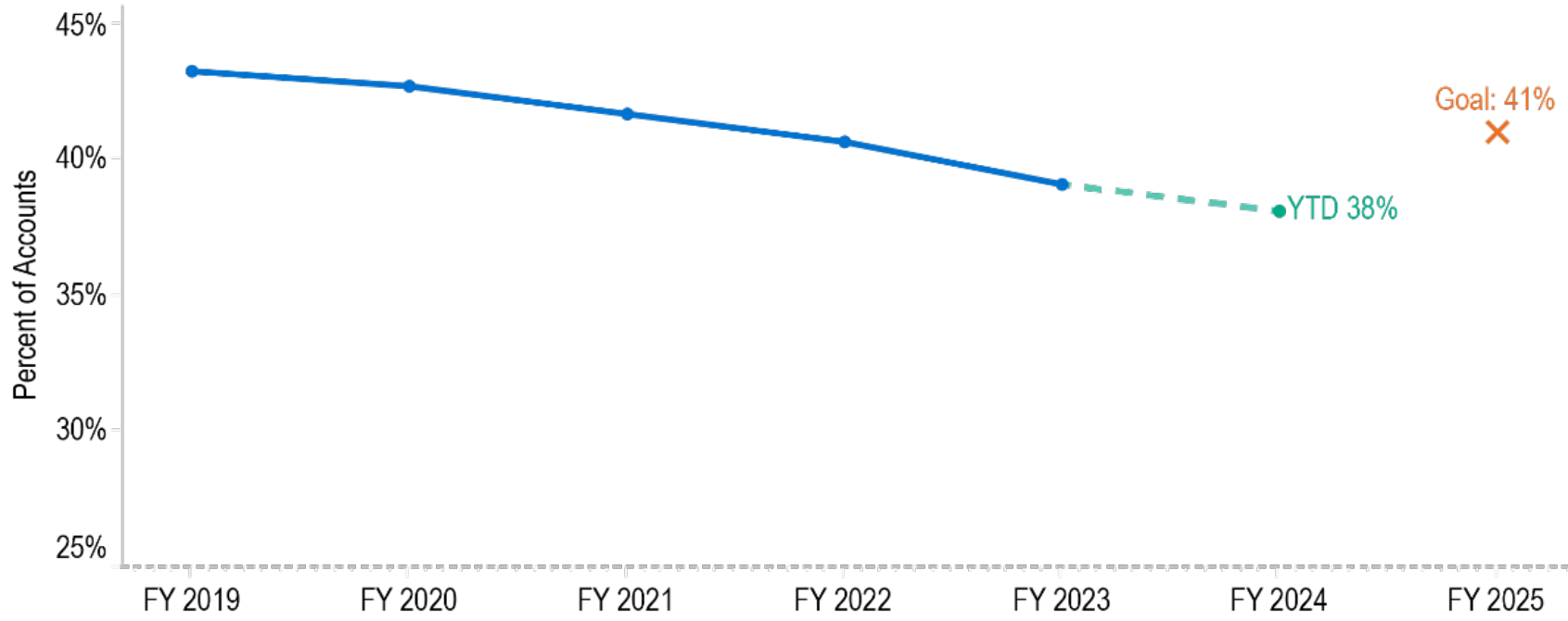
7,800 Annual Goal **8,359** YTD Accounts Tracking 27.2% Higher Than Goal



Account growth metrics

my529 accounts will be as ubiquitous as 401(k) accounts.

Percent of Accounts with Automatic Monthly ACH Contributions

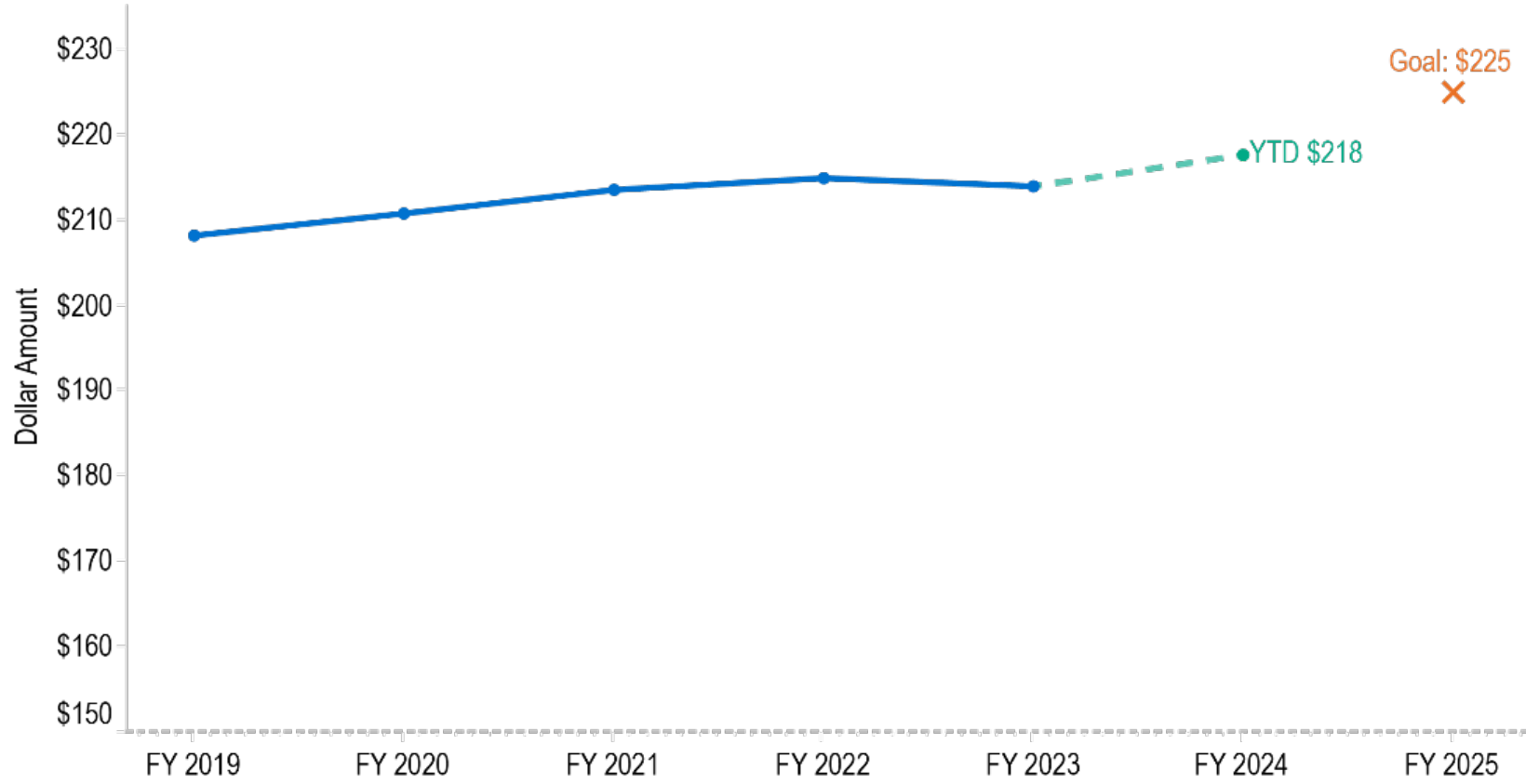


Excluding CSA/Scholarship Accounts and Accounts w/Balances Over \$50K

Account growth metrics

my529 accounts will be as ubiquitous as 401(k) accounts.

Average Recurring Monthly ACH Contribution Amount



Excluding CSA/Scholarship Accounts

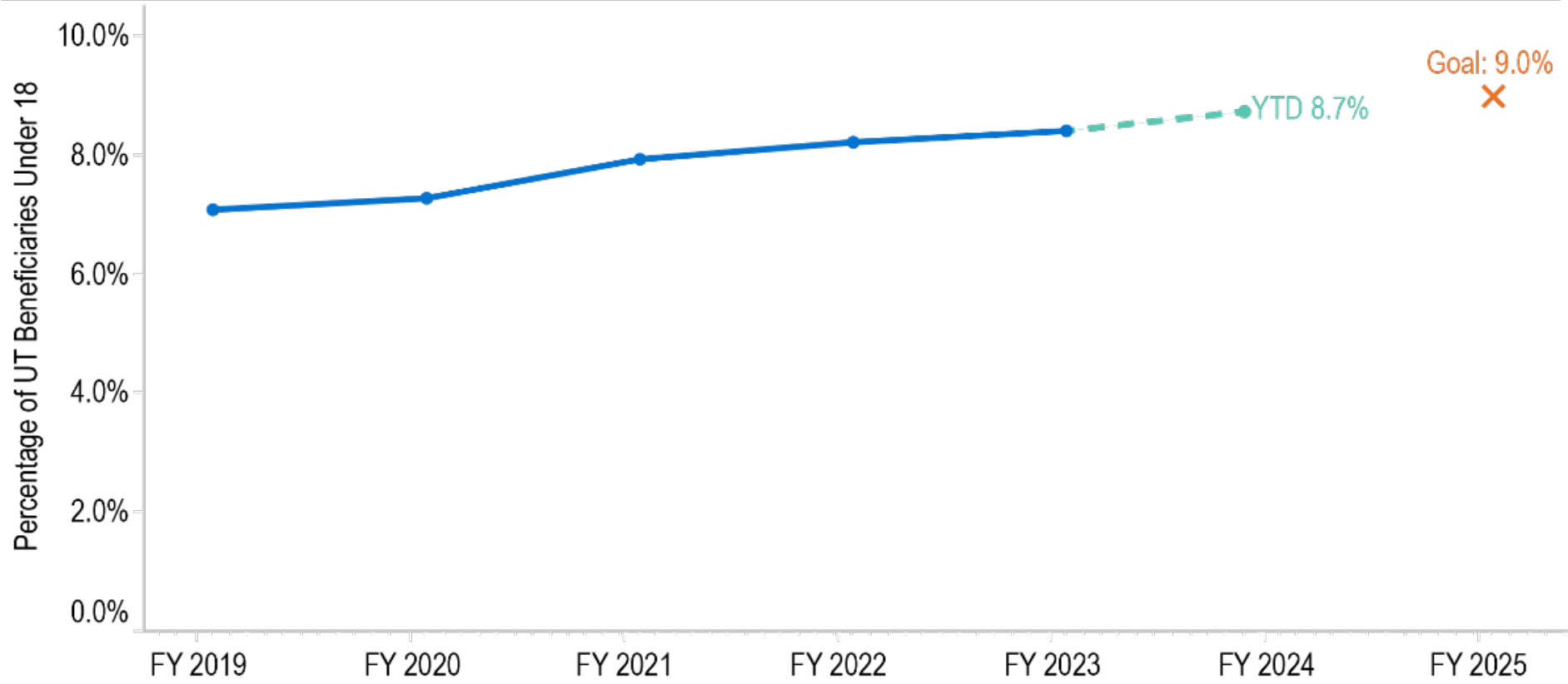


All data as of April 30, 2024

Account growth metrics

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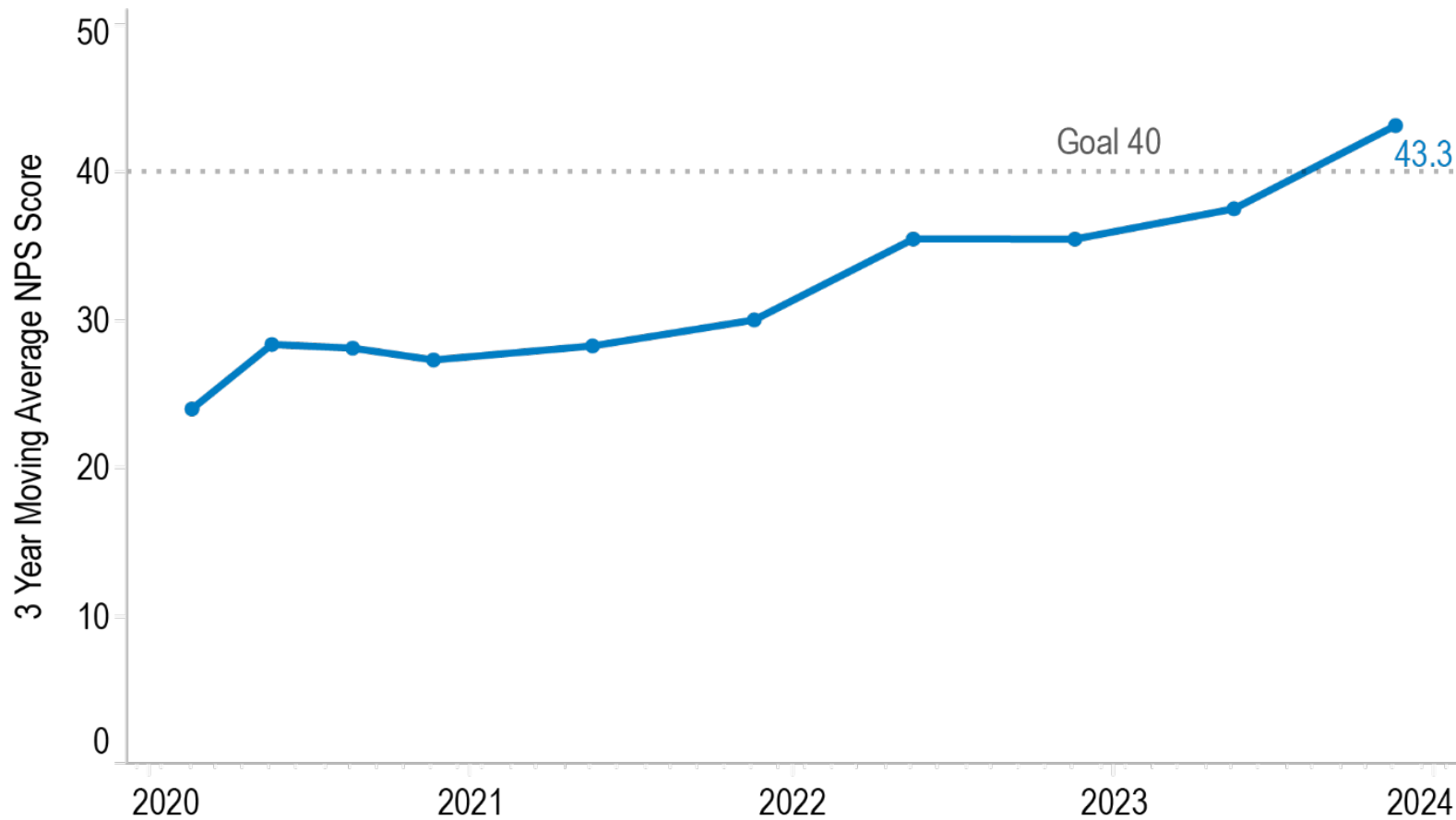
Percentage of Utah Beneficiaries Under Age 18 at June 30



our529 culture metric

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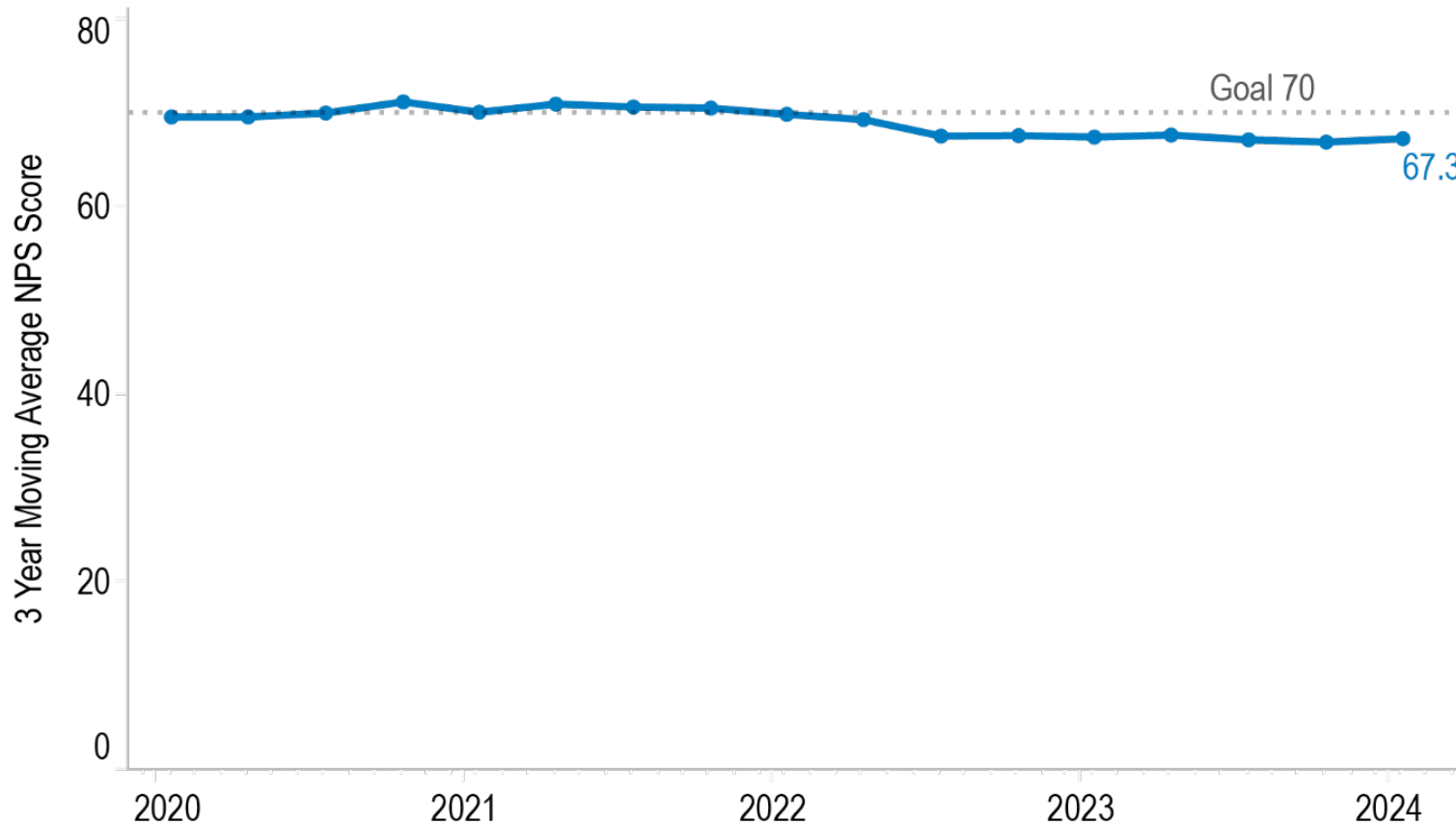
Employer Moving Average Net Promoter Score



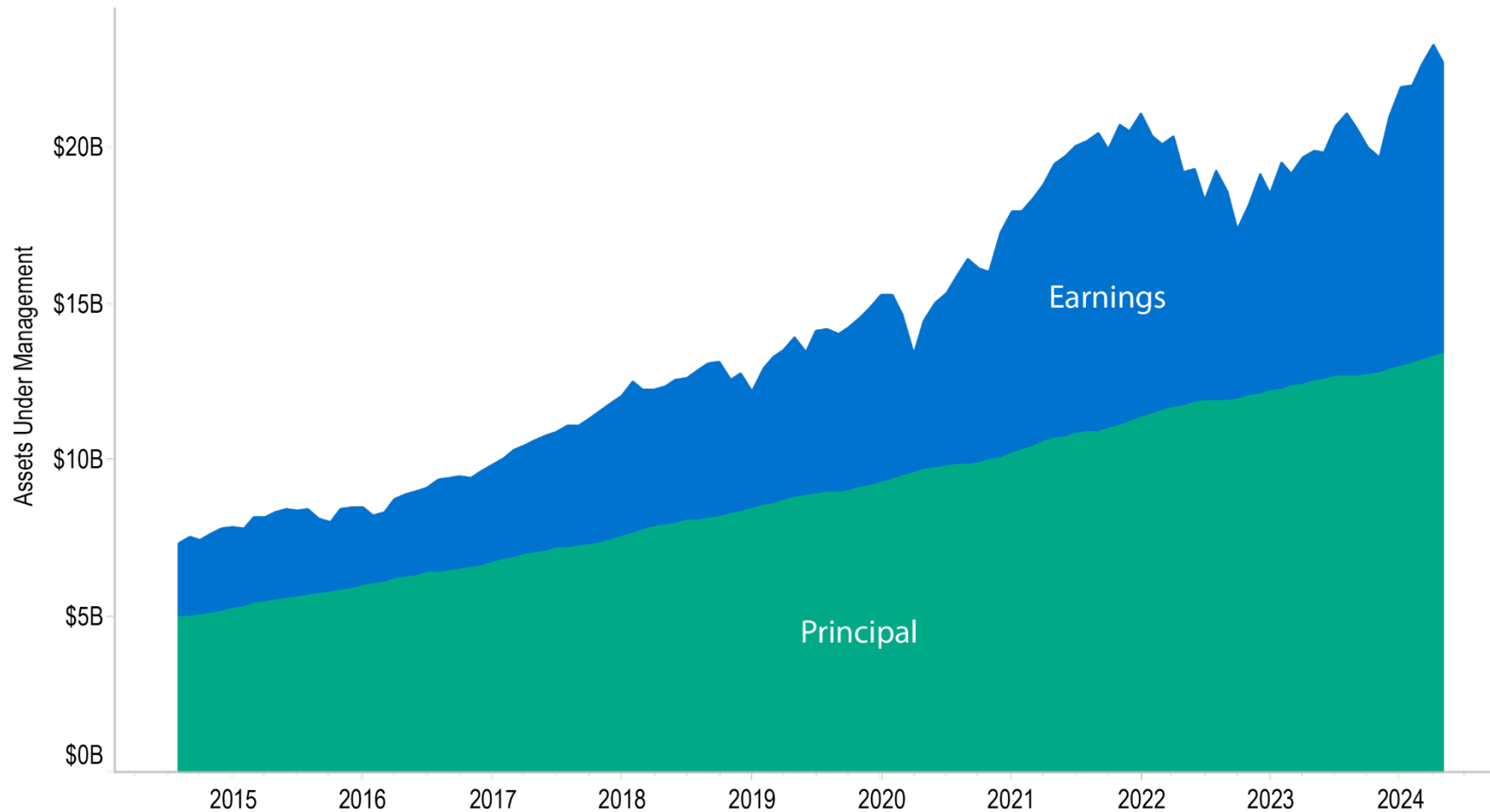
Account owner experience metric

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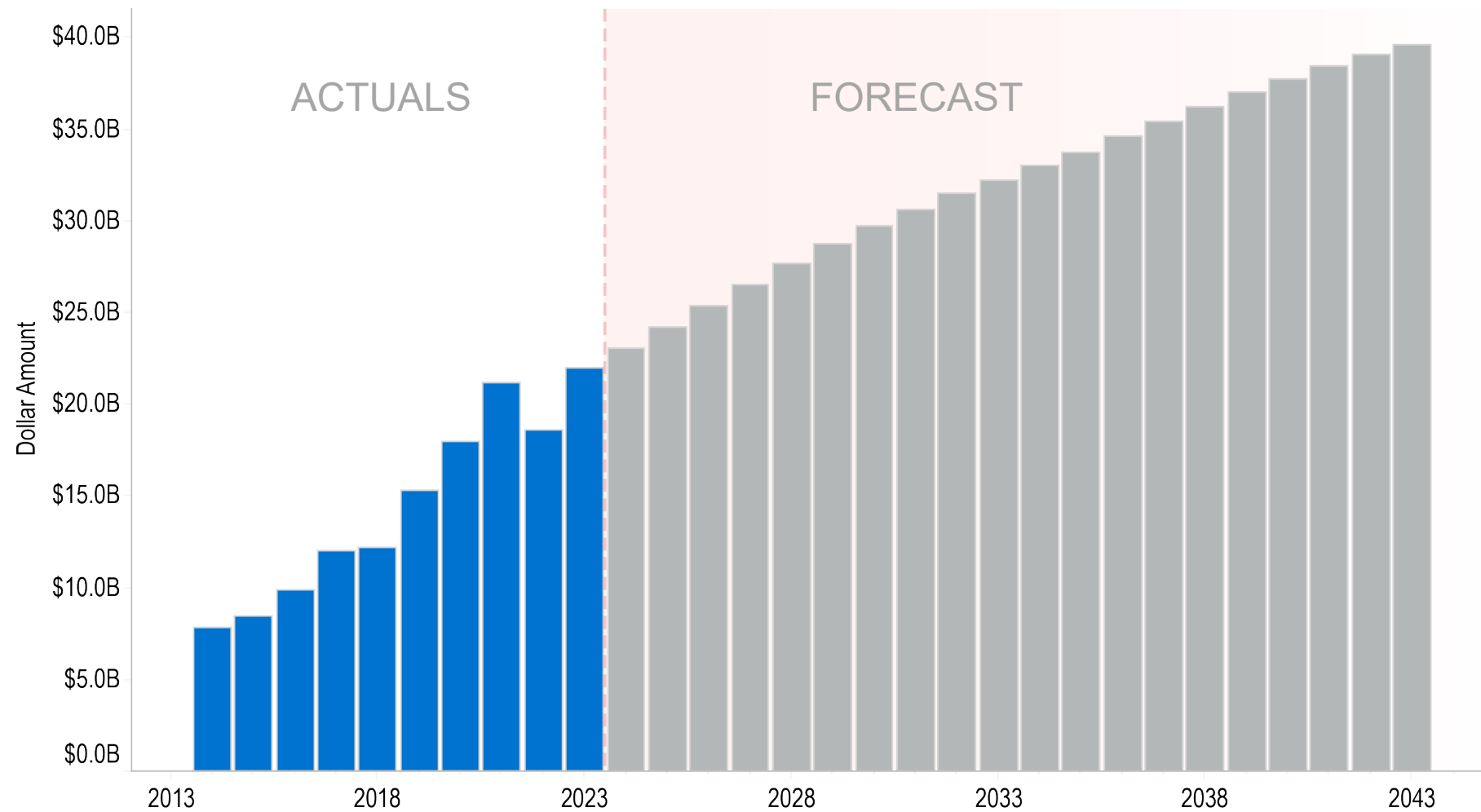
Account Owner Moving Average Net Promoter Score



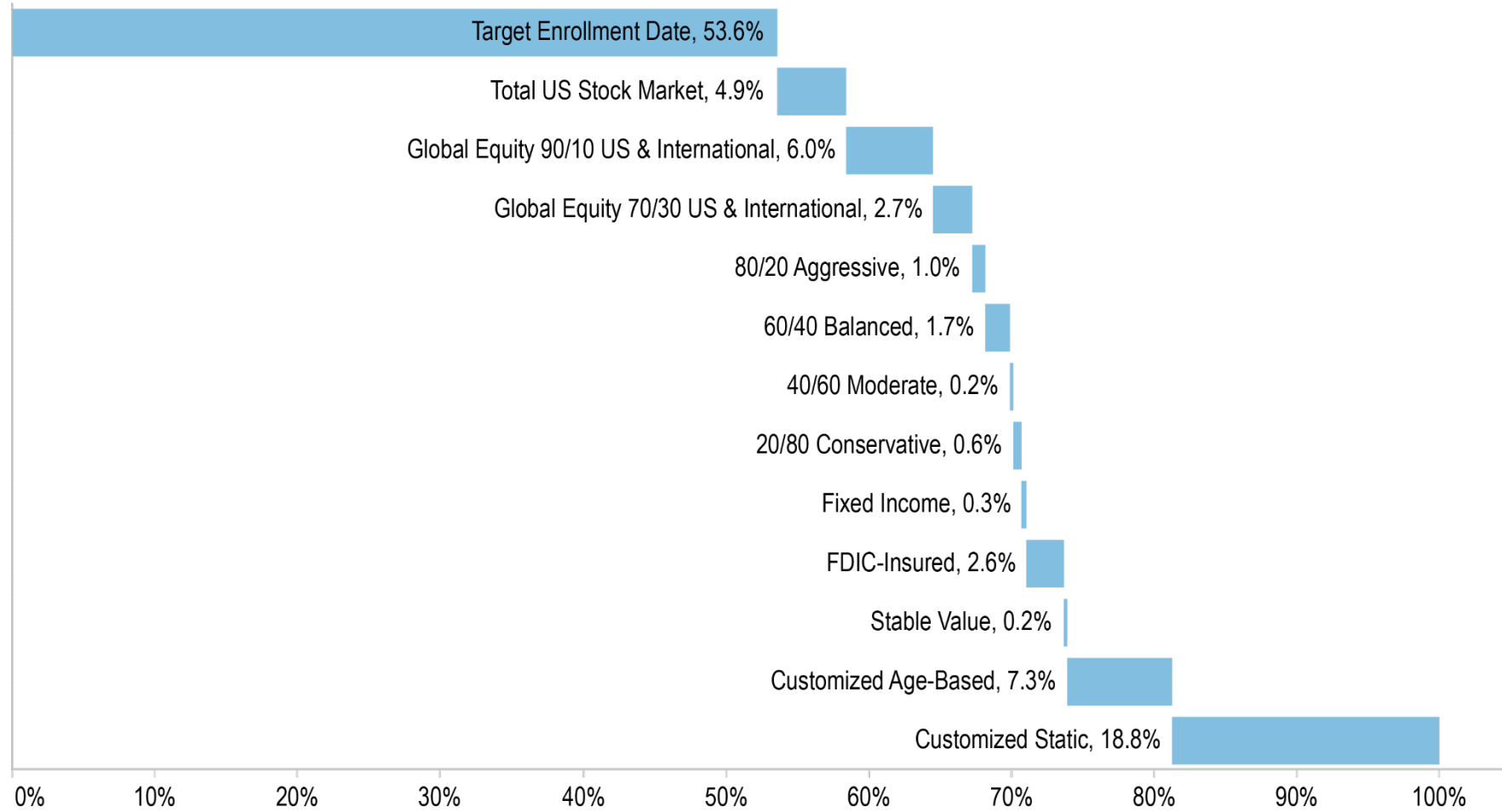
Total assets under management



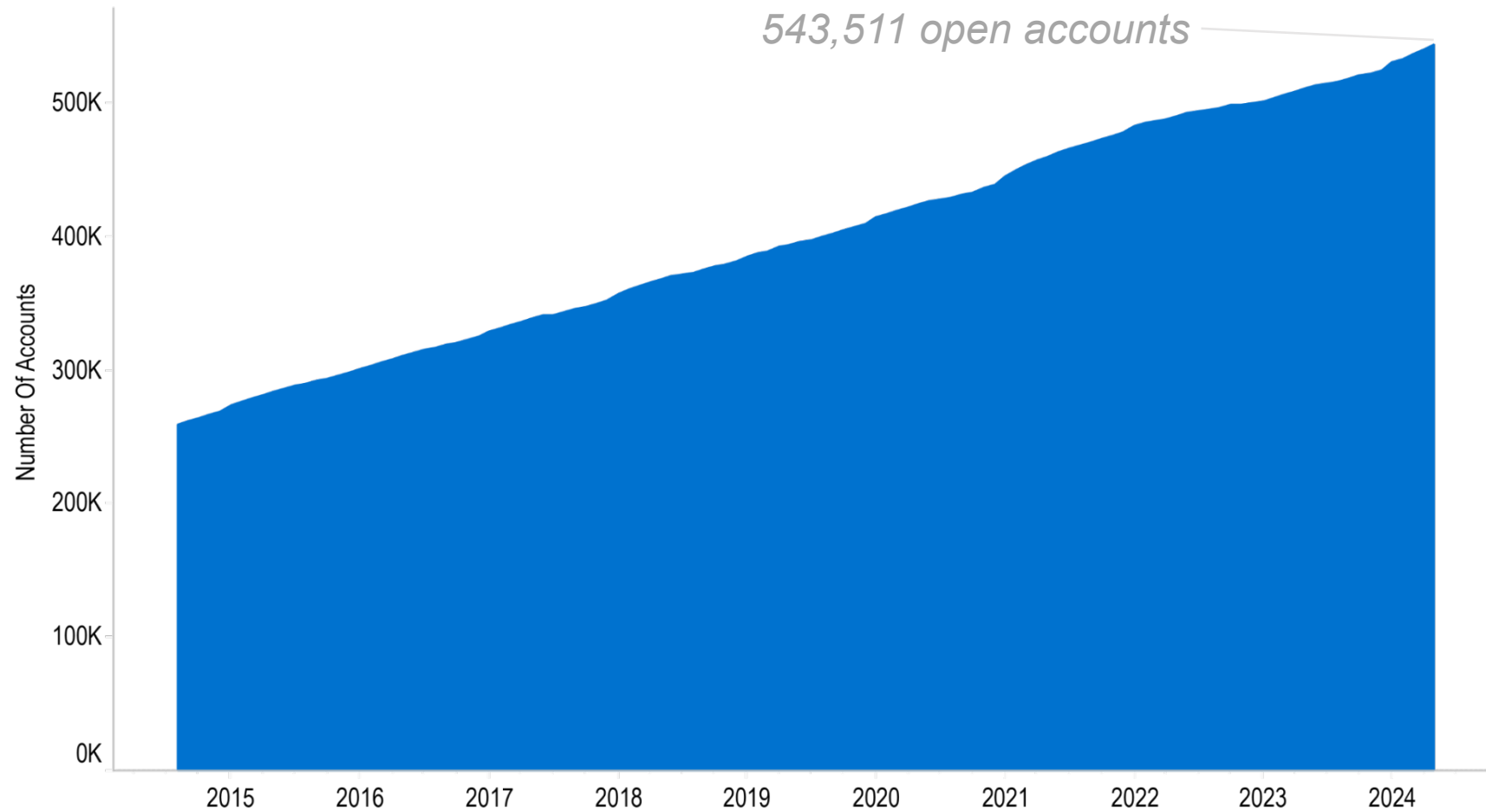
Forecast: Assets under management



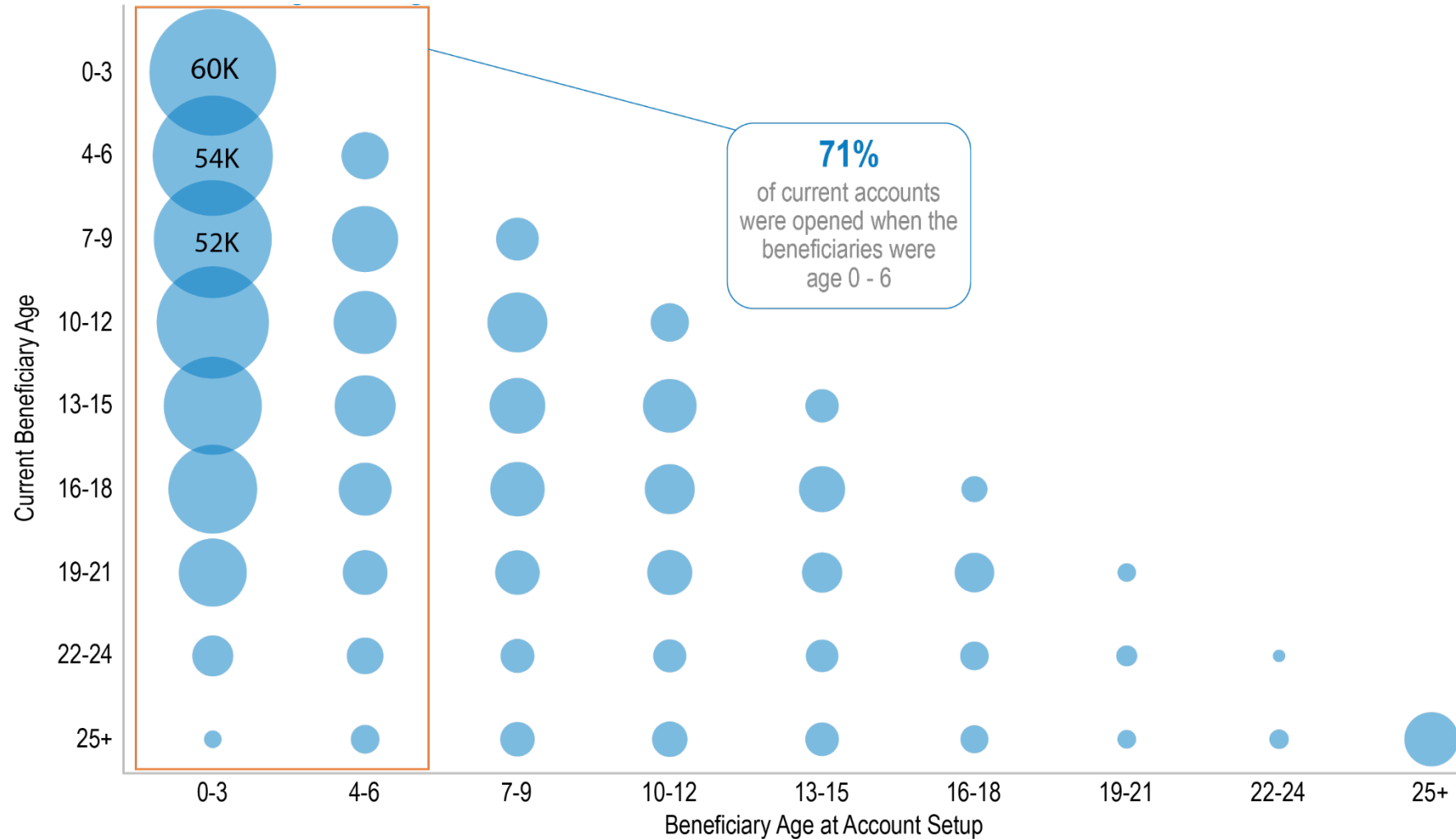
Percentage of assets by investment option



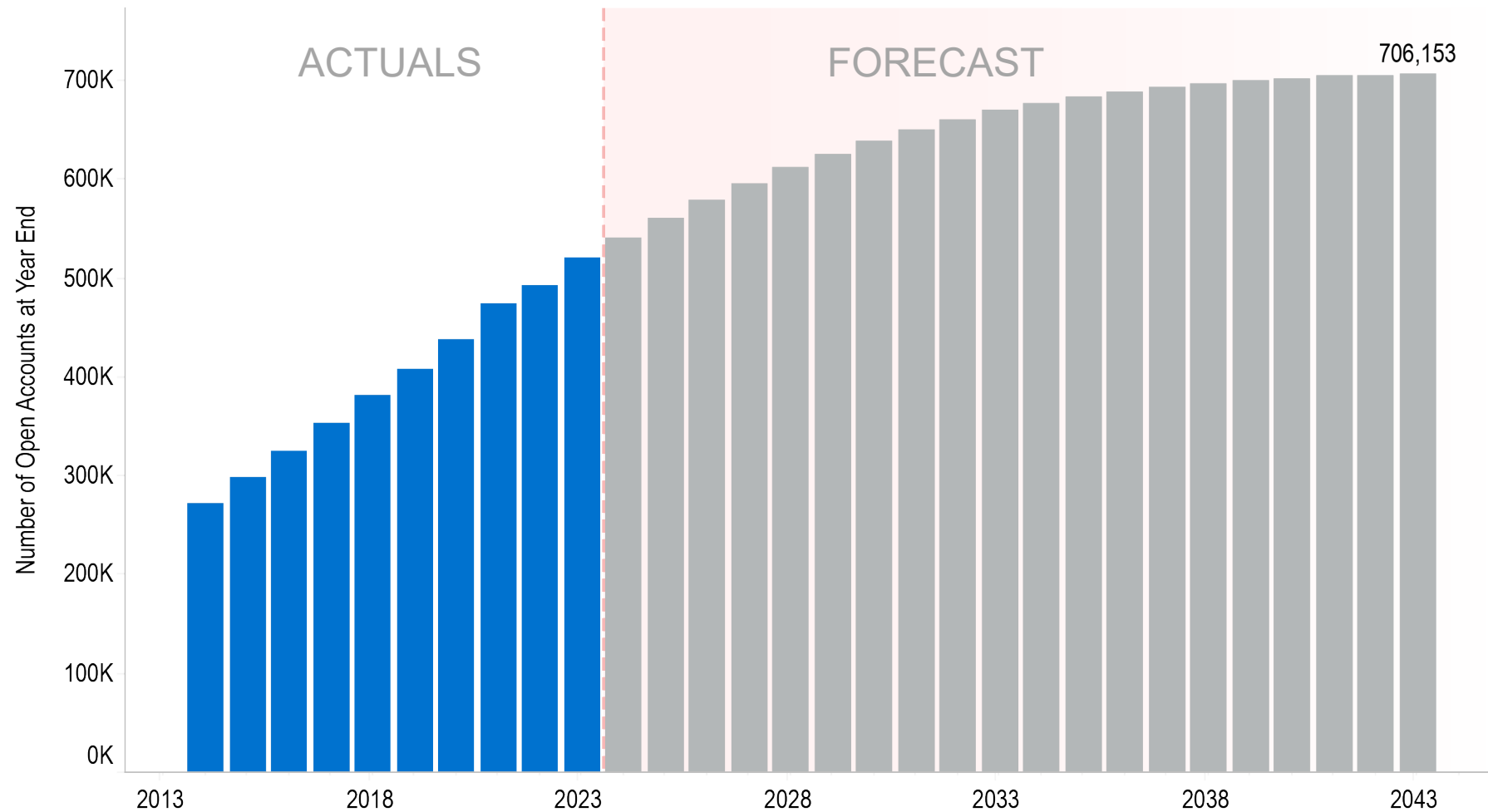
Number of open accounts



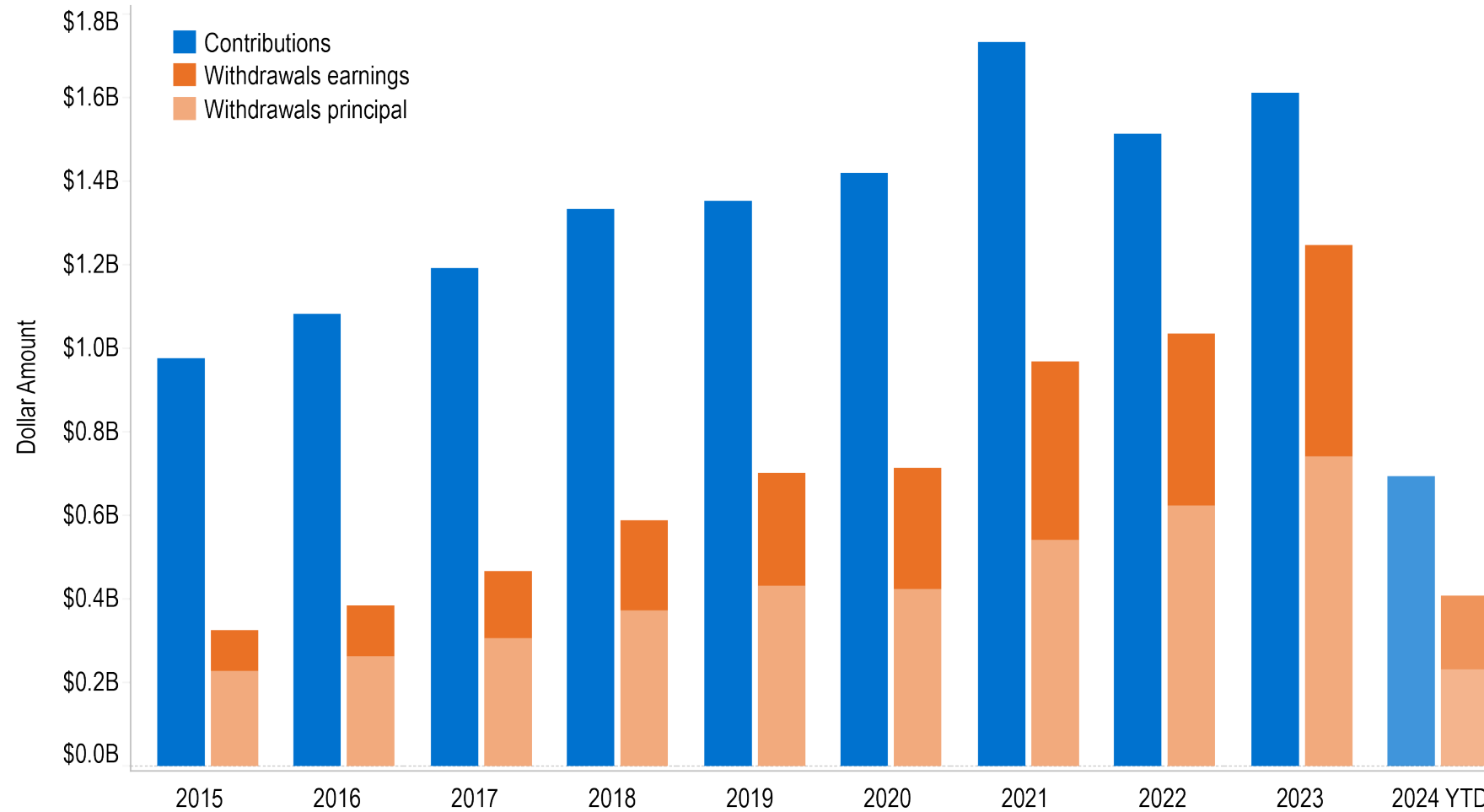
Beneficiaries through the ages



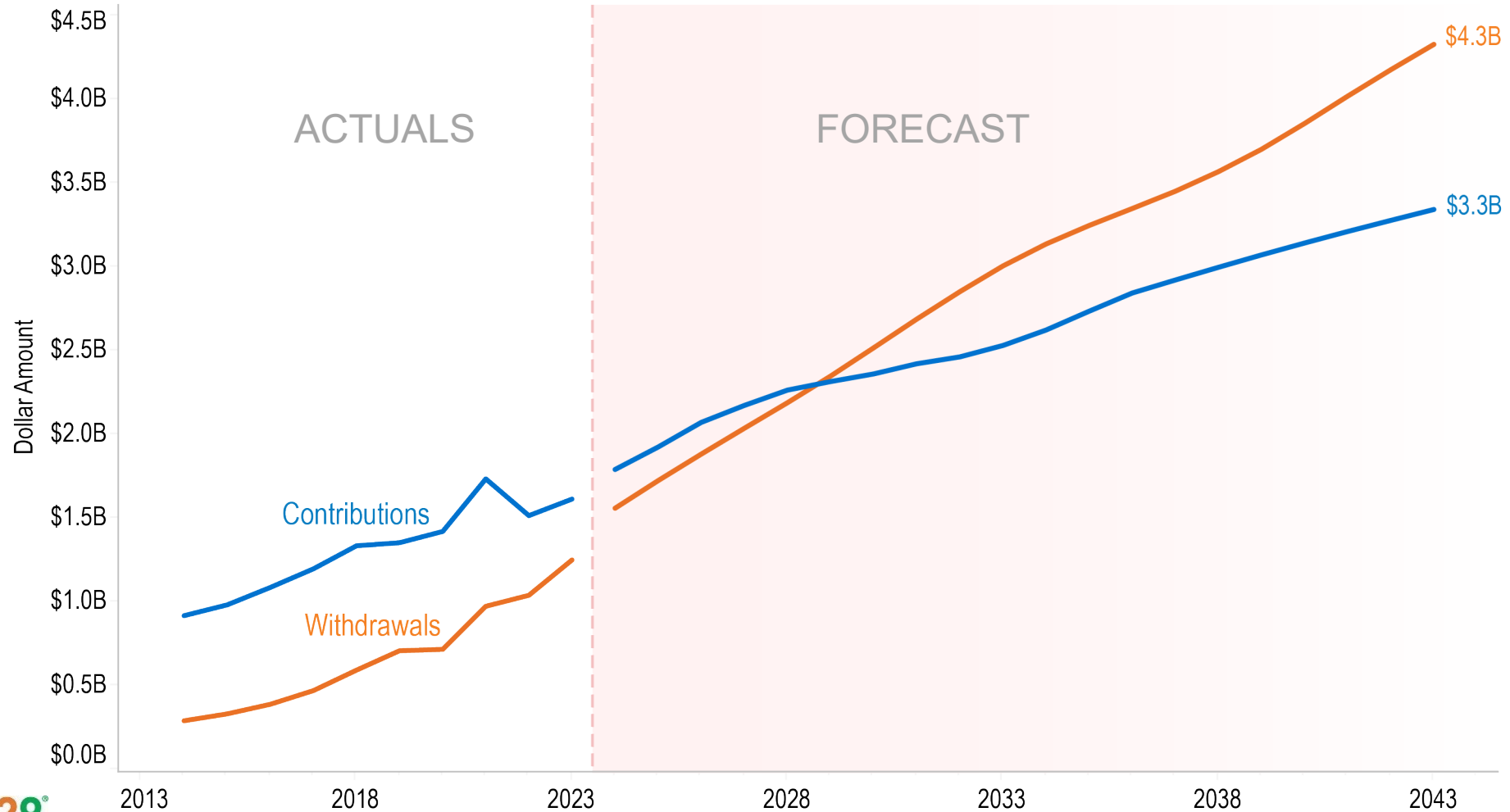
Forecast: Number of open accounts



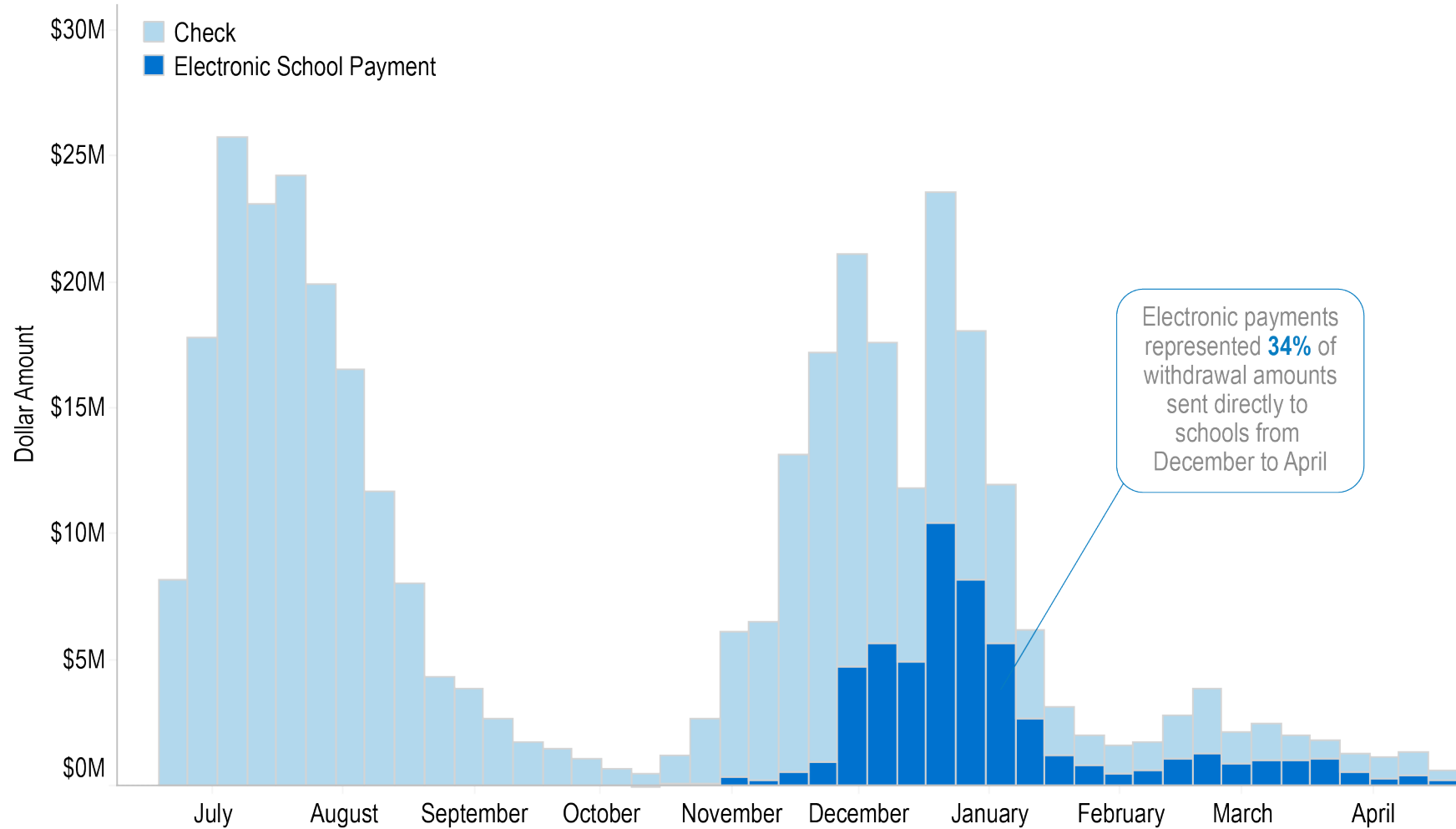
Contributions vs withdrawals



Forecast: Contributions and withdrawals

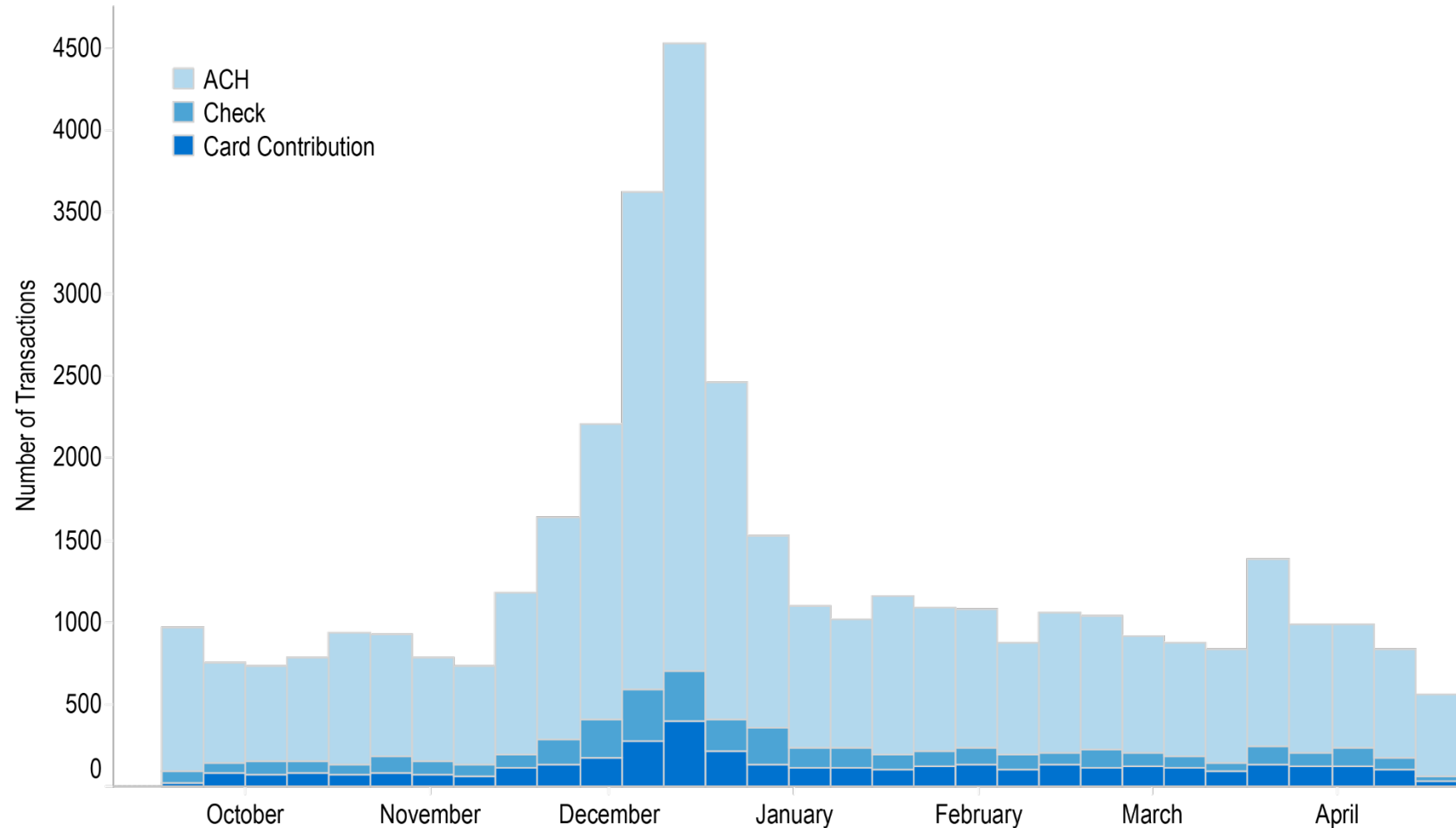


Payments to schools



Electronic payments represented **34%** of withdrawal amounts sent directly to schools from December to April

Gifting transactions by week



Access card withdrawal dollar amount by week

