

Investing for education made easy



Account Owner Benefits

- Accounts are free to open.
- Earnings are tax-free when spent on qualified higher education expenses.*
- Funds can be used at eligible colleges, universities and technical schools nationwide and abroad.
- Utah state tax credit available for Utah taxpayers.
- Fees are among the lowest in the nation.



USHE Counselor Conference

Receive a \$20 matching my529 contribution

1. Open a my529 account between September 16-30, 2020
2. Enter promotional code **2009UCC**
3. Receive a \$20 matching my529 contribution when you contribute at least \$20.
4. To qualify, the account owner must be a Utah resident. The beneficiary must be new to my529.

*Only valid while promotional funds are available.

Visit <https://my529.org/other-essentials/frequently-asked-questions> for more information.

*Qualified higher education expenses include tuition and fees; books and supplies; computers, required equipment and internet access; and certain room and board costs. Funds can also be used for K-12 tuition expenses at public, private or religious schools (up to \$10,000 annually); registered apprenticeship programs; and payment of qualified education loans (up to \$10,000).

Important Legal Notice

Investing is an important decision. Read the Program Description in its entirety for more information and consider all investment objectives, risks, charges, and expenses before investing. For a copy of the Program Description, call 800.418.2551 or visit my529.org. Investments in my529 are not insured or guaranteed by my529, the Utah Board of Higher Education, the Utah Higher Education Assistance Authority or any other state or federal agency. Your investment could lose value. However, Federal Deposit Insurance Corporation (FDIC) insurance is provided for the FDIC-insured accounts. Please read the Program Description to learn about the FDIC-insured accounts. The state in which you or your beneficiary pays taxes or lives may offer a 529 plan that provides state tax or other benefits, such as financial aid, scholarship funds, and protection from creditors, not otherwise available to you by investing in my529. You should consider such benefits, if any, before investing in my529. my529 does not provide legal, financial, investment, or tax advice, and the information provided in this document does not contain legal, financial, investment, or tax advice and cannot be construed as such or relied upon for those purposes. You should consult your own tax or legal advisor to determine the effect of federal and state tax laws on your particular situation.