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my529 debuts online resources to engage employers

Learn more about educational savings as a benefit for employees

(Salt Lake City) Attracting and retaining top talent can be a challenge in today's job market. Bolster your comprehensive benefits package by including my529, an educational savings plan, as a no-cost, elective employee benefit. my529 is the nation's third largest direct-sold plan. Learn more at my529.org/employer, my529's new employer resource page.

Financial wellness and education savings benefits can contribute to employee retention and job satisfaction. The Bank of America Merrill Lynch 2017 Workplace Benefits Report found that 67% of millennials and 32% of baby boomers said that financial stress affects their workplace productivity. The 2018 version of the report noted that 91% of employees said that financial wellness programs had been effective, while 95% of employers said such programs have helped companies to reach their goals.

What we do

my529 has been helping families nationwide prepare for higher education costs for more than 20 years. Accounts are free to open, with no required ongoing contributions, so account owners can contribute what they want, when they want. You and your beneficiary can live in any state.

Account owners can withdraw their money tax-free for qualified higher education expenses to be used at any eligible educational institution—college, university or technical school—in the United States or abroad that is qualified to participate in federal student aid programs.

Support for businesses

September is national College Savings Month. To celebrate, my529, Utah's educational savings plan, launched the employer resource page to take the campaign of investing for college into the workplace. We can partner with businesses to help employees with their educational goals.

- Find plan information, downloadable resources, and implementation ideas at my529.org.
- Give us a call or set up a meeting.
- Brochures and materials available.

Are you located in Utah? my529 is based in Salt Lake City.

my529 representatives are available to speak with employees during on-site presentations, health fairs and benefits fairs. We will provide my529 materials, offer giveaways and answer questions at these events.

my529 enrollment kits and informational brochures are also available upon request. Utah resident taxpayers can earn a 5% tax credit per qualified beneficiary for contributions up to certain limits.

my529's Outreach team is here to help. Contact Jenny Sass at 801.321.7153 to answer questions and to get started.

About my529

my529, Utah's official nonprofit 529 educational savings plan, is highly rated by Morningstar Inc.

Accounts are free to open, and my529 requires no minimum deposit or account balance. my529's user-friendly website, my529.org, makes it easy to open, manage and contribute to an account online.

Qualified higher education expenses include tuition and fees; books and supplies; computers, related equipment and internet access; and certain room and board costs. Funds can also be used for an aggregate total of \$10,000 in K-12 tuition expenses per beneficiary each calendar year at public, private and religious schools.

To learn more, visit my529.org, call toll-free at 800.418.2551, or email info@my529.org.

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 State Board of Regents, 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.

A Morningstar Analyst Rating™ for a 529 college savings plan is not a credit or risk rating. Analyst ratings are subjective in nature and should not be used as the sole basis for investment decisions. Morningstar does not represent its analyst ratings to be guarantees. Please visit Morningstar.com for more information about the analyst ratings, as well as other Morningstar ratings and fund rankings.