



## 529 Day 2022

It's not too early to picture a future of educational goals. And my529 can help with a fast start on preparing for that path.



Celebrate 529 Day all this month with my529, Utah's educational savings plan, by opening a **college** savings account, and begin with a boost from us.

### A special offer for Utah residents

Open a new my529 account between May 1 and May 31, 2022, and you could be eligible to receive up to \$40 contributed to your account.

**First**, to receive a \$25 matching contribution from my529, open an account for a beneficiary who is new to my529, and contribute \$25.



### Requirements to participate

1. You must be a Utah resident.
2. Your beneficiary does not have to be a Utah resident, but they must be new to my529.
3. You must open a my529 account between Saturday, May 1, and Monday, May 31, 2022, in one of the following ways:
  - Go to my529.org, click Enroll Now, and follow the prompts.
  - Complete and submit an Individual Account Agreement, available for download at my529.org.
4. Include the following promotional code during the account setup process: **529Day2022**
5. Contribute at least \$25 to your new my529 account between May 1 and May 31, 2022, to be eligible for the my529 match. my529 will match the \$25 contribution on or about **June 7, 2022**.

### Promotion will continue as long as promotional funds are available.

**Second**, to get an additional \$15 (for a total amount of \$40 with the initial \$25 match), set up recurring contributions on the new account.

### Requirements to participate

1. You have successfully completed the steps outlined above and qualify for the \$25 matching promotion using the promotional code: **529Day2022**
2. You set up an automatic monthly recurring contribution when you open your my529 account between May 1 and May 31, 2022.
3. The monthly automatic contribution must occur uninterrupted for six consecutive months to be eligible for the additional \$15 my529 contribution.
4. The \$15 contribution from my529 will then occur on or around **December 31, 2022**.

### Promotion will continue as long as promotional funds are available.

### To qualify for this promotion:

- **The account owner must be a Utah resident.**
- **The beneficiary must be new to my529.**



Employees of my529 and the Utah Board of Higher Education and their immediate family members are not eligible for this offer. my529 will make deposits into qualifying accounts on a first-come, first-served basis for as long as the promotional funds are available. This promotion is void where prohibited by law. my529 reserves the right to stop the promotion at any time and for any reason.

New Individual Account Agreements and contributions submitted by mail, fax, overnight carrier or in person must be received by my529 between May 1 and May 31, 2022, by 5 p.m. MT. Accounts opened and contributions made online at my529.org must be received between May 1 at 12:01 a.m. and May 31, 2022, by 11:59 p.m. MT. Documentation must be in good order to process and receive the match. This promotion applies only to my529 accounts that are opened by Utah residents between May 1 and May 31, 2022, in recognition of 5•29 Day.

There is no cost to open a my529 account, and all ongoing fees are described in the my529 Program Description, available at my529.org. Please consult your tax advisor about the tax implications of participating in this promotion. Visit my529.org or call 800.418.2551 for more information.

Edit This

### Please Read. This Is Important.

Do not invest with my529 until you read the [Program Description](#).

If you are going to invest your money in a my529 account, we encourage you to learn how our college savings plan works. The Program Description explains the investment options, rules on contributions and withdrawals, tax benefits, fees, and risks. Your investment could lose value. Except for the FDIC-insured option, my529 investments aren't guaranteed.

So take a look.

[Legal Notice and Disclaimer](#)

#### Phone

800.418.2551

#### Fax

800.214.2956

#### Email

[info@my529.org](mailto:info@my529.org)

#### Mailing Address

PO Box 145100  
Salt Lake City, UT 84114-5100

#### [Contact Us](#)



© my529 |  
The term my529 is a registered service mark.

### Important Legal Notice

Investing is an important decision. The investments in your account may vary with market conditions and could lose value. Carefully 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.

**Account Value.** Investments in my529 are not insured or guaranteed by my529, the Utah Board of Higher Education, the Utah Higher Education Assistance Authority Board of Directors, any other state or federal agency, or any third party. However, Federal Deposit Insurance Corporation (FDIC) insurance is provided for the FDIC-Insured investment option. In addition, my529 offers investment options that are partially insured for the portion of the respective investment option that includes FDIC-insured accounts as an underlying investments. Units in my529 have not been registered with the United States Securities and Exchange Commission or with any state securities commission.

FDIC insurance is subject to limits set by federal law. Click [here](#) for more information about FDIC Insurance.

**Non-Utah Taxpayers and Residents.** The state in which you or your beneficiary pay taxes or live 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.

**Consult an advisor.** my529 does not provide legal, financial, investment, or tax advice, and the information provided on this website does not contain 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.

**Morningstar rating.** 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.](#)