

# Financial wellness includes my529

Add us to your competitive benefits package at **no cost** to you

## Your employees are already saving for retirement, but how many are saving for their children's college education?

Your company may already provide tuition assistance or student loan repayment to your employees. Adding a my529 educational savings plan can provide a comprehensive education solution for your employees AND their loved ones.

my529, Utah's official 529 educational savings plan, has been helping families invest for education for 30 years.

## Employer benefits

- No cost to you
- Helps employees invest for education expenses
- May help you retain talent
- Onboarding materials available
- Simple to implement

## Employee benefits

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



## 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](http://my529.org).

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**my529 makes it easy for you to share our program's benefits with your employees**

## Free downloadable resources

- General my529 brochure
- FAQ (English and Spanish)
- Presentation poster
- Payroll direct deposit instructions
- my529 logos (to link from your benefits page)
- my529 related content to utilize in an employee newsletter or e-blast

**my529**<sup>®</sup>

UTAH'S EDUCATIONAL SAVINGS PLAN

## More information



Visit us at

[www.my529.org/for-employers/](http://www.my529.org/for-employers/)

Contact

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

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**Link to our College Savings Estimator Tool**

[www.my529.org/learn/college-savings-estimator/](http://www.my529.org/learn/college-savings-estimator/)