

Picture your plan

Invest in education today for a rewarding tomorrow

my529[®]

UTAH EDUCATIONAL SAVINGS PLAN



Because education mattersSM

Why open a my529 account?

my529 encourages families to save for future qualified education expenses. 529 plans are sponsored by states, state agencies and educational institutions. They are authorized by Section 529 of the Internal Revenue Code.

my529 benefits

- Direct-sold — you can open a my529 account on your own.
- Account owners, not the beneficiary, control their accounts.
- Earnings in a my529 account grow tax-deferred.
- Withdrawals are tax-free if used on qualified education expenses.
- Variety of investment options, with opportunities for growth.

Utah resident income tax credit

Utah taxpayers can claim a Utah state income tax credit for each qualified beneficiary on my529 account contributions up to certain amounts.

Not just for Utah schools

When your child is ready, you can use your money at any university, college or technical school in the U.S. or abroad that is qualified to participate in federal student aid programs.

Receive a \$10 matching my529 contribution

- Open a my529 account on or before October 31, 2025.
- Enter promotional code **2025BTS**.
- Receive a \$10 matching my529 contribution when you contribute at least \$10.
- To qualify, the account owner must be a Utah resident. The beneficiary must be new to my529.

Only valid while promotional funds are available.

Open an account at my529.org



my529[®]

800.418.2551 | my529.org

my529 is Utah's official 529 plan.

Follow **my529[®]**



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. Investments in my529 are not insured or guaranteed by my529, the Utah Board of Higher Education, the Utah Education Savings Board of Trustees, 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 investment. 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. my529 does not provide legal, financial, investment or tax advice. You should consult your own tax or legal advisor to determine the effect of federal and state tax laws on your particular situation.