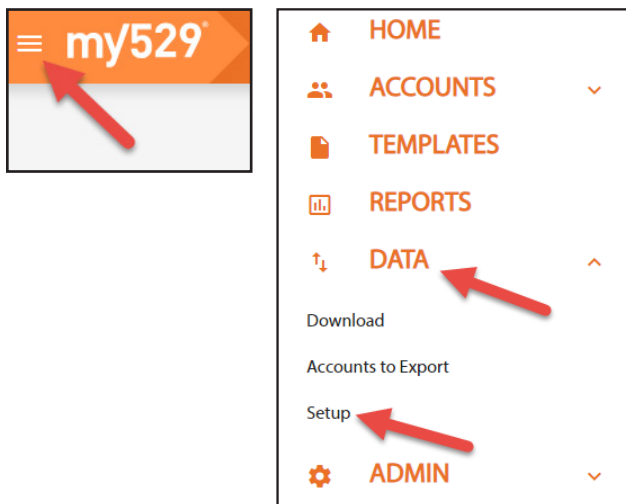


my529 Data Provider Selection Instructions

A Limited Power of Attorney (LPOA) entity can log in at advisor.my529.org and elect to send client account data to a back-office service provider (BOSP) via SFTP. The BOSP selection can only be made by the Master Administrator or a user who has been granted this permission.

Step 1—Log in to Advisor Access at advisor.my529.org.

Step 2—Click on the menu icon in the top left corner, then click **Data**, then **Setup**.



Step 3—Click **Edit**. Then click on the BOSP(s) you wish to use for your data and click **Next**. You can select more than one data provider.



Step 4—Review the data disclosure authorization form. Click **Agree & Save**.

Step 5—You will then have the option of selecting which accounts to include in your data feed. If you choose the **All Accounts** option, all existing accounts as well as any new accounts added going forward will be included in your data feed. If you choose the **Select Specific Accounts** option, you need to add the accounts manually to the feed by clicking the toggle switch next to those accounts. To save the selection, click **Done**.

ACCOUNTS TO EXPORT

All Accounts
 Select Specific Accounts
15 of 15 accounts selected.

<input checked="" type="checkbox"/>	Account Owner/Agent	Beneficiary
<input checked="" type="checkbox"/>	J De	U Ue
<input checked="" type="checkbox"/>	R Ad	R Ad
<input checked="" type="checkbox"/>	C Na	C Na
<input checked="" type="checkbox"/>	C Na	E Na
<input checked="" type="checkbox"/>	C Na	M Na
<input checked="" type="checkbox"/>	C Na	H Na
<input checked="" type="checkbox"/>	C Na	R So
<input checked="" type="checkbox"/>	C Na	S Ha
<input checked="" type="checkbox"/>	C Na	A So
<input checked="" type="checkbox"/>	C Na	J He

15 of 15 selected

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Step 6—An email is sent to your firm to confirm completion of the data feed enrollment. A confirmation email is also sent to the BOSP(s) receiving the data.

Step 7—Contact your representative at the BOSP, provide them your my529 LPOA number and let them know you want to start receiving direct data feeds from my529.

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. my529 does not pay commissions, loads or sales charges to financial advisors nor does it endorse financial advisors.