

# Save for education with my529

my529, Utah's educational savings plan, is part of the Utah System of Higher Education. We have been helping families invest for 30 years.

## Why my529

- Accounts are free to open and do not require ongoing contributions.
- Earnings are tax-free when spent on qualified education expenses.
- Utah state tax credit available for Utah taxpayers.
- The my529 Gift Program allows friends and family a secure path to contribute funds to a beneficiary's account.
- Funds can be used for the costs for registered apprenticeships and qualified postsecondary credentialing expenses.
- A free [College Savings Estimator tool](#) that takes the guesswork out of education savings.

*Investing for future education early gives your money more potential for growth.*

**Utah State University employees can receive a special offer. Scan the QR code for more information.**



**my529**<sup>®</sup>

UTAH EDUCATIONAL SAVINGS PLAN



**[my529.org](https://my529.org) | [800.418.2551](tel:800.418.2551) | [info@my529.org](mailto:info@my529.org)**



### 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](https://my529.org). Investments in my529 are not insured or guaranteed by my529, the Utah Board of Higher Education, 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.*