



CollegeChoice 529

Save for college at your 9-to-5

10 reasons to offer this free payroll deduction benefit to your employees



Good for your employees

- 1 The Plan helps parents, grandparents, and others save for a loved one's education.
- 2 CollegeChoice 529 offers low-cost, professionally managed investment options.
- 3 Your employees will appreciate the ease of payroll deduction and the Plan's online account management.
- 4 The account owner decides how and when the funds are used.
- 5 The account owner can continue to contribute after employment ends.

Good for your company

- 6 A 529 plan differentiates your benefits plan from competitors' plans.
- 7 You can offer this payroll deduction benefit at no additional cost to your company.
- 8 CollegeChoice 529 is a complementary benefit to 401(k) and other employer-sponsored saving programs.
- 9 A 529 plan enhances other education-related benefits, such as tuition reimbursement.
- 10 There are no additional reporting requirements, such as 5500.



The benefit of 529 plans — with less paperwork, cost, and effort.

CollegeChoice 529[★]
DIRECT SAVINGS PLAN

For more information about the CollegeChoice 529 Direct Savings Plan, call 1.866.485.9415 or visit www.collegechoicedirect.com to obtain a Disclosure Statement which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Upromise Investments, Inc. Distributor and Underwriter.

If you are not an Indiana taxpayer, consider before investing whether your or the beneficiary's home state offers any state tax or other benefits that are only available for investments in such state's qualified tuition program.

CollegeChoice 529 Direct Savings Plan (Plan) is administered by the Indiana Education Savings Authority. Upromise Investments, Inc. serves as the Program Manager and Upromise Investment Advisors, LLC, provides investment advisory services and recordkeeping and administrative services. Upromise Investments, Inc. and Upromise Investment Advisors, LLC have overall responsibility for the day-to-day operations, including marketing and distribution of the Plan. Dodge & Cox; Frontegra Asset Management, Inc.; The Vanguard Group, Inc.; and Western Asset serve as Investment Managers for the Plan. The Plan's Portfolios, although they invest in mutual funds are not mutual funds. Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns are not guaranteed, and you could lose money by investing in the Plan.

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