

ALASKA 529

NEW FEATURES,
ENDLESS
POSSIBILITIES.

Prepare for the latest
enhancements to your
529 plan.



In July 2024, Alaska 529 will undergo a transition to a new online and mobile experience.

This transition is part of our commitment to improving the overall account holder experience and ensuring that saving for education is convenient and accessible for all account holders. It will allow us to introduce several enhancements to improve your education savings experience.

T. Rowe Price will continue to serve as the plan's program manager. Your investments and portfolio options in the plan will stay the same, and your current automatic monthly contributions will remain unchanged. We will continue to offer the **Dash to Save**® and **Dash to Save More**® incentive programs post-transition.



OVERVIEW OF PLAN ENHANCEMENTS

You asked and we listened. Introducing an improved online account and mobile experience with expanded gifting capabilities.



Improved online and mobile experience: We are updating the online and mobile features to facilitate efficient management of your account while providing you with advanced tools to accomplish your goals. Enjoy streamlined account management with upgraded features and a new app for easy account access.



New online gifting tool: We are introducing a new gifting tool that enables you to easily and securely invite friends and family to contribute to your beneficiary's account while providing you with improved gift tracking capabilities.



Electronic distributions to more than 800 educational institutions: Easily and securely make online payments directly to eligible schools.

WHAT YOU NEED TO DO



1 Reestablish your online account access

You must reestablish your online access by creating a new username and password after the transition is complete on July 29, 2024, to continue accessing and managing your account online.

- Visit Alaska529plan.com on or after July 29, 2024, click Log In, and create a new username and password to continue accessing and managing your account online.
- Review and reconfirm your document delivery preferences. The new platform combines your delivery preference for statements and Plan Disclosure Document updates into one election.
- Establish your investment allocation percentages for future contributions.

Have an account but have never logged in?

See the steps above to establish online access and start taking advantage of plan enhancements.

2 Take note of your new account number

After the transition is complete on July 29, 2024, you will receive a new account number by mail. Or, if you have selected electronic delivery of documents, a confirmation statement with a new account number will be accessible in your account online.

- **About your new account number:** You will have one account number for yourself and a two-digit extension representing each of your beneficiaries. Your new account number will be a nine-character alphanumeric string beginning with A8, followed by your main account number, and ending with a two-digit extension distinguishing each beneficiary. If you have only one beneficiary, the extension is 01; for each of your subsequent beneficiaries, it is 02, 03, etc. Example: A8XXXXXXXX-01, A8XXXXXXXX-02, etc.

3 Review your account

Your account information, including account history, account preferences, automatic monthly contributions, and investment selections, will automatically transition to the new platform.

- If you currently contribute to your account through direct deposit, you will receive a separate mailing with transition instructions. If you do not receive this mailing, contact us for assistance. Due to changes in account and bank routing information, any direct deposit contributions submitted on your behalf after the start of the transition will be returned unless you reestablish direct deposit contributions.
- If you currently make contributions through bill pay via your bank, you will need to update the payment instructions with your new Alaska 529 account number and address: PO Box 219865, Kansas City, MO 64121.
- Destroy any Alaska 529 contribution slips you may have. New contribution slips will be provided.
- **Alaska residents:** You will receive additional communications if you elected to direct a portion of a 2024 PFD into an Alaska 529 account. Visit Alaska529plan.com/PFD to learn more about required actions.

TRANSITION TIMELINE



Thursday, July 25, 2024

Online account access will be unavailable beginning at 12 p.m. Alaska Time. No transactions will be processed (regardless of the method by which they are submitted) if submitted after 12 p.m. Alaska Time until after the transition to the new platform is complete.

- Your account, including records and access to assets, will automatically transition to the new account platform.
- You will receive a confirmation statement with your new Alaska 529 account number by mail shortly after the transition is complete, or if you have elected electronic delivery of documents, a confirmation statement will be accessible in your account online.



Monday, July 29, 2024

Activity resumes as normal. Reminder, you will need to reestablish your username and password.

Updated contact information:

- **Regular Delivery Address:**
Alaska 529
PO Box 219865
Kansas City, MO 64121
- **Overnight Delivery Address:**
Alaska 529
1001 E 101st Terrace, Suite 200
Kansas City, MO 64131
- **Phone Number:** 1-888-425-2752
- **Website:** Alaska529plan.com
- **Email:** clientservice@Alaska529plan.com

We are committed to providing you with a modern and secure online and mobile experience to support your education savings goals. Be sure to read this information carefully, including the provided update to the Plan Disclosure Document which can also be found online at Alaska529plan.com. If you have any questions or require assistance during this transition, please contact us at 1-800-478-0003.



ALASKA529

WHATEVER SPARKS YOUR CHILD'S IMAGINATION AND
CURIOSITY, WE'VE MADE IT EASIER TO SAVE FOR IT.

SAVE IN ALASKA, STUDY ANYWHERE.

1-800-478-0003 | Alaska529plan.com

If you are not an Alaska resident, you should compare this Plan with any 529 plan offered by your home state or your beneficiary's home state and consider, before investing, any state tax or other state benefits, such as financial aid, scholarship funds, and protection from creditors that are only available for investments in the home state's plan. Please read and/or download the Plan Disclosure Document, which includes investment objectives, risks, fees, charges and expenses, and other information that you should read and consider carefully before investing, or call 1-800-478-0003 to request a paper copy.

Offered by the Education Trust of Alaska.

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