

529 Boost FAQs

There's an easy way to help employees save more for college and boost your company's benefits package. 529 Boost lets you customize a match program for employees enrolled in a 529 college savings plan. With 529 Boost, you can:

- Create and control match amounts and frequency
- Add and remove participants online
- Approve match contributions prior to funding, and more.

99% of parents believe college is a worthwhile investment.* Show that your company does, too. Visit 529boost.com, or contact your dedicated representative.



Frequently Asked Questions

What is 529 Boost?

529 Boost is a web-based portal (529boost.com) that was developed to provide employers and other Boost sponsors, with an easy and secure method for matching contributions to their employee's IDeal – Idaho College Savings 529 accounts.

What information do I have to provide at registration?

When you first go to 529boost.com, you will be asked to register by supplying your name, contact information and company. You will select a user name and password and set up a security question. Once your registration has been approved, you'll receive your access authorization by email.

How do I add another employee to my company's account?

You may register additional employees to help you administer your Boost account(s). Each subsequent user will need a unique user name and email address. We allow multiple user names to be associated with the same company. We do not allow multiple user names to be associated with the same email address.

How do I reset my password?

If you forget the password to your Boost account, you can be reminded by email. If you are still unable to log in, contact 529 Boost by calling 1-888-823-4329.

How do I manage my Boost programs?

When you log in to your Boost portal, you will see a list of active programs. Each program includes a program name, contribution history, and the ability to edit or deactivate the program. You will also see all user names associated with this account. If there is an action required on a program, you will receive an alert message at the top of the account overview.

How do I create a program?

Login to your 529 Boost account and select "Create a new program". Then you will be prompted to enter the program name, match program rules, and select from a list of eligible 529 plans. When you've completed that step, you will be prompted to enter contribution details including dates, frequency, and types.

How do I edit a program?

Login to your 529 Boost account and select "Edit program". There you will be able to adjust match program rules, the eligible contribution types, and match cycles.

How do I manage contributions?

Login to your 529 Boost account and select the program for which you are ready to initiate contributions. This is a three-step process that may be completed over several days or months. The first step is to add or update your list of eligible employees one at a time or from a pre-formatted eligibility spreadsheet. Indicate on the spreadsheet which employees are eligible by changing the Yes/No designation in the row to the right of the employee's name. Second is to request a list of eligible contributions to be matched. Finally, approve the list and wire the funding.

How do I change employee eligibility?

Login to your 529 Boost account and select the program for which you want to make the updates. Select "Contributions" and then "Update Eligibility". You can change a single employee's eligibility on the screen, or multiple by uploading a spreadsheet. Simply mark an employee with a "Y" for eligible, and "N" for ineligible in the eligibility column.



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How do I update the eligible employees?

Login to your 529 Boost account and select the program for which you want to make the updates. Select "Contributions" and then "Update Eligibility". Then you will be able to download a pre-formatted eligibility spreadsheet of the existing employees.

How do I add an individual employee?

Login to your 529 Boost account and select the program for which you want to make the updates. Select "Contributions" and then "Update Eligibility". You can add a newly eligible employee under Option 1 by entering their 529 account number and their first and last name.

How secure is this site?

529 Boost has four built-in security factors:

- 128-bit SSL encryption
- Password protection
- Timeout of authentication sessions
- Strict registration requirements

Are there any technical requirements for using this browser?

No. All you need is access to a standard web browser.

What if I need help with the site?

If you have issues with the site, or need help with account access, you can call 529 Boost at **1-888-823-4329**, Monday through Friday, 8:00 a.m. to 8:00 p.m. Eastern time.



Your local IDeal representative

Nick Thiros will be your HR/Payroll team's partner and will help set up your match program. Additionally, he will be your ongoing contact for any education, technical help or overall questions. Feel free to forward his contact information to any appropriate team members for any of the following:

- Help in setting up your organization's match program
- Discussing the benefits of a payroll direct deposit
- Assisting HR/Payroll departments with initiating payroll direct deposits
- Leading seminars for employees on savings for education goals and the benefits of IDeal 529
- Staffing benefit fairs
- Providing educational materials for staff and employees

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Questions on IDeal - Idaho College Savings Program?
Learn more at idsaves.org



*The Princeton Review 2019 College Hopes & Worries Survey Report

For more information about the Idaho College Savings Program (IDeal), call 866-433-2533 or visit www.idsaves.org to obtain a Disclosure Statement. The Disclosure Statement discusses investment objectives, risks, charges, expenses, and other important information. Because investing in IDeal is an important decision for you and your family, you should read and consider the Disclosure Statement carefully before investing.

If you are not an Idaho taxpayer, consider before investing whether your or the beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in such state's qualified tuition program.

IDeal is administered by the Idaho College Savings Program Board (Board). Ascensus Broker Dealer Services, LLC ("ABD"), the program manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory and recordkeeping and administrative services. The Vanguard Group, Inc. (Vanguard) serves as Investment Manager for IDeal. Sallie Mae Bank serves as the Savings Portfolio Manager for IDeal. IDeal's Portfolios invest in either: (i) mutual funds offered or managed by Vanguard; or (ii) an FDIC-insured omnibus savings account held in trust by the Board at Sallie Mae Bank. Except for the Savings Portfolio, investments in IDeal are not insured by the FDIC. Units of the Portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns will vary depending upon the performance of the Portfolios you choose. Except to the extent of FDIC insurance available for the Savings Portfolio, you could lose all or a portion of your money by investing in IDeal, depending on market conditions. Account Owners assume all investment risks as well as responsibility for any federal and state tax consequences.

Not FDIC-Insured (except for the Savings Portfolio). No Bank, State or Federal Guarantee. May Lose Value.