



FOR IMMEDIATE RELEASE

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## **Perspective Wealth Partners Grant \$4,000 in Education Scholarships for Treasure Valley**

(Boise) – Eight kids who ran in the YMCA’s Harrison Classic received an adrenaline boost and a financial boost this past month. Perspective Wealth Partners, a Boise-based Registered Investment Advisor, awarded \$500 scholarships to eight randomly-drawn participants in this annual kids-only race for ages 14 and under. Each winner will receive their \$500 contribution in an iDeal—Idaho College Savings Program account. When the winners are ready to use their savings, they’ll be able to withdraw the funds to use for eligible education-related expenses anywhere in the U.S.<sup>1</sup>

“We encourage all the families we work with to plan and save ahead for higher education just as they would for any other important investment in their future. It’s a smart financial move, and it’s a great way to get children dreaming big about their futures,” said James Bailey, President of Perspective Wealth Partners.

Due to COVID-19, this year’s race looked a little different. Rather than all racers competing together on one day, the event took place October 5-11 and registrants were on the honor system to complete their 1-mile walk or run from wherever they chose on any day within the given timeframe. Knowing that the event would be different this year, there was also a School Prize of \$400 for the school with the most participants. The winner was Calvary Christian School, with over 95 kids signing up—very impressive considering there are only 100 kids in the school. In total, 399 youth completed this year’s event.

Among the winners who won a \$500 iDeal scholarship:

Zoey Clegg (10 years old)

Jakobe Naito (9 years old)

Sam Wimmer (8 years old)

Sarah Burbank (7 years old)

Blake Felgate (6 years old)

Charlotte Baeyen (3 years old)

“This is a great example of a business in our community stepping up to help support our state’s goal of building a college-going culture,” said Christine Stoll, iDeal Executive Director. “We’re grateful for Perspective Wealth Partners and their commitment to helping more Idahoans take advantage of iDeal—Idaho 529 College Savings Program.”

To learn more about iDeal, visit [www.idsave.org](http://www.idsave.org).

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**About iDeal – Idaho College Savings Program**

IDeal's office is located within the State Treasurer's office. IDeal is administered by the State College Savings Program Board. Ascensus Broker Dealer Services, LLC serves as Program Manager. The State College Savings Board consists of the following members:

- State Treasurer Julie Ellsworth, Board Chair
- Governor Brad Little (Greg Wilson, designee)
- State Controller Brandon Woolf (Patrick Hodges, designee)
- Attorney General Lawrence Wasden (Brian Kane, designee)
- Superintendent of Public Instruction Sherri Ybarra (Louie Konkol, designee)
- Secretary of State Lawrence Denney (Chad Houck, designee)

For more information, contact Christine Stoll at 208-332-2935, [cstoll@idsaves.idaho.gov](mailto:cstoll@idsaves.idaho.gov) or visit [www.idsaves.org](http://www.idsaves.org).

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*For more information about the Idaho College Savings Program ("IDeal"), call 866-433-2533 or visit [www.idsaves.org](http://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.*

*Before you invest, consider whether you're 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 the that state's qualified tuition program.*

IDeal is administered by the Idaho College Savings Program Board ("Board"). Ascensus Broker Dealer Services, LLC, the program manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services, and marketing. 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 and a separate account 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.**