

CollegeChoice Advisor

For more information about the CollegeChoice Advisor 529 Savings Plan (CollegeChoice Advisor), call 1.866.485.9413 or visit www. collegechoiceadvisor529.com to obtain a Disclosure Booklet, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Ascensus Broker Dealer Services, LLC. (ABD) is distributor of CollegeChoice Advisor.

Before you invest, consider 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 that state's qualified tuition program.

CollegeChoice Advisor is administered by the Indiana Education Savings Authority (Authority). ABD, the Program Manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services, and marketing. CollegeChoice Advisor's Portfolios invest in: (i) exchange-traded funds; (ii) mutual funds; (iii) separate accounts; (iv) a cash preservation account held in trust by the Authority at New York Life; and/or (v) an FDIC-insured omnibus savings account held in trust by the Authority at NexBank. Except for the Savings Portfolio, investments in CollegeChoice Advisor are not insured by the FDIC. Units of the Portfolios are municipal fund 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, depending on market conditions, you could lose all or a portion of your money by investing in CollegeChoice Advisor. Account Owners assume all investment risks, as well as responsibility for any federal and state tax consequences.

Ugift is a registered service mark.

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

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## UGIFT IS A FREE SERVICE THAT MAKES COLLEGE SAVINGS EASIER.



There's one gift your child will never outgrow, break, or leave on the bus: a college education. With Ugift, you can invite family and friends to celebrate big moments in your child's life by contributing to your college savings instead of a traditional gift. The money goes directly into your CollegeChoice Advisor account and gets invested. Plus, it's absolutely free to use. Get started by logging into your account at collegechoiceadvisor529.com





## You pick the guests, Ugift does the rest.

- 1. Log into your CollegeChoice Advisor account.
- 2. Click on the Ugift link.
- 3. Opt-in to get a Ugift code that's unique to your account.
- 4. Share your code using Ugift's email and social sharing options.
- 5. Or, print out invitations and coupons to hand out or mail.
- 6. Gift givers contribute online at Ugift529.com, or by mailing a check.
- 7. Contributions go directly into your 529 account and are invested.
- **8.** Gift givers can also print out a certificate to present at the event.
- 9. Gift givers who provide us with an email address will automatically receive a Thank You email.
- 10. Keep track of all Ugift transactions online.

Help family and friends give a gift that lasts a lifetime. Log into your account to start using Ugift now.