

Indiana529

Advisor Savings Plan



Expand your company's benefits
with *education savings*.

Offer a 529 plan at no cost to your company.



Indiana529 Advisor is a simple, tax-smart way to help your employees save for future education expenses with expert guidance from a financial professional.

Here are just a few reasons why you should offer the Indiana529 Advisor Savings Plan by payroll direct deposit:¹

Good for your employees

- Indiana529 Advisor offers a range of professionally managed investments.
- Your employees will appreciate the ease of saving for education through payroll direct deposit.
- The account travels with the employee, wherever their career takes them.
- Employees can save for their children, grandchildren, or to continue their own education.

Good for your company

- A 529 plan can help your company stand out—only 7% of employers offer a 529 plan, but 49% of workers say they are interested in it as a benefit.²
- Offer a payroll direct deposit benefit at no additional cost to your company.
- Indiana529 Advisor complements 401(k)s and other employer-sponsored savings programs, and enhances other education-related benefits, such as tuition reimbursement.
- Contributions are after tax, so there's no additional reporting requirement.



¹A plan of regular investment cannot assure a profit or protect against a loss in a declining market.

²2019 Guardian Workplace Benefits Study, 6th Annual: College Debt in America.



**For more information on how to make
Indiana529 Advisor a part of your
company's benefits plan, contact me:**



For more information about the Indiana529 Advisor Savings Plan (Indiana529 Advisor), call 866-485-9413 or visit [Indiana529advisor.com](https://indiana529advisor.com) to obtain a Disclosure Booklet, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing.

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.

Indiana529 Advisor is administered by the Indiana Education Savings Authority (Authority). 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. Indiana529 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 Indiana529 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.

1665886-GOV-1665887 (07/2025)