

# Indiana529

**Advisor** Savings Plan



## Ugift® is a *free service* that makes it easier to save for education.

There's one gift your child will never outgrow, break, or leave on the bus—an education. With Ugift, you can invite family and friends to celebrate big moments in your child's life by contributing to their education savings instead of a traditional gift. This service is completely free to use, and the money gets invested directly into your Indiana529 Advisor account.



Log in at  
[Indiana529advisor.com](https://Indiana529advisor.com)  
to get started.



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

1. After logging in, click the Ugift link to get a unique code for each Indiana529 beneficiary and share via email, social media, or print.
2. Gift givers contribute online at [Ugift529.com](https://Ugift529.com) or by mailing a check. Certificates are available to print and present to friends and family.
3. Contributions go directly to your Indiana529 Advisor account, and a thank you email is sent automatically to gift givers who provide an email address.

**Bonus!** Gift givers are eligible for Indiana state tax credit.\*

\*Indiana taxpayers are eligible for a state income tax credit of 20% of contributions to an Indiana529 Advisor account, up to \$1,500 credit per year (\$750 for married couples filing separately). This credit may be subject to recapture from the account owner (not the contributor) in certain circumstances, such as rollovers to another state's 529 plan, federal nonqualified withdrawals, withdrawals used to pay elementary or secondary school tuition for a school outside of Indiana, qualified education loan repayments, or rollovers to a Roth IRA account, as described in the Disclosure Booklet.

**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.

Ugift® is a registered service mark.

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