

You can make a big difference in a child's future

We want families throughout your community to learn about an easy, affordable way to save for college. That's why we are asking you to help us get the word out about Indiana's own **CollegeChoice 529 Direct Savings Plan**. It's a college savings plan that offers families a tax-advantaged way to start saving now for tomorrow's higher education costs.

- Families can enroll for as little as \$25
- There are important tax advantages, including a state income tax credit of 20% of contributions to a CollegeChoice 529 account, up to \$1,000 credit per year for Indiana taxpayers*
- An account can be opened online
- Investment options are professionally managed
- Account assets can be used at any eligible 2- or 4-year college or vocational/technical school

Our Institutional Relationship Manager is ready to help

Speaking of help, our local Institutional Relationship Manager is available to help you get the word out on this important topic by:

- Leading workshops for civic groups on saving for college
- Speaking at your organization's meetings
- Staffing a table at a community fair

Contact us

To invite your Institutional Relationship Manager to your next event:

Submit: An online request at indianas529.com (**Upcoming Events**)

Email: indianaemployer@ascensus.com

To learn more or for additional informational materials:

Visit: indianas529.com

Call: **1.866.485.9383, Monday – Friday, 8 a.m. to 8 p.m. Eastern time**

* This credit may be subject to recapture from the account owner (not the contributor) in certain circumstances, such as a rollover to another state's 529 plan or a non-qualified withdrawal. Please note that, effective January 1, 2010, the Indiana state income tax credit will no longer apply to rollovers from another state's qualified tuition program or to transfers from the Upromise service into a CollegeChoice 529 account. All other contributions will continue to be eligible for the tax credit to the extent previously allowable.



Spread the word

- If families think they can't save for college, you can inspire them to believe that they can with a 529 plan.
- No student should have to pass up dreams of college or vocational school because they can't afford to go.
- Families throughout your community need your help to start saving for college today.

To help you get the word out, we are pleased to send you this **Community Leader's Kit**. It contains materials including CollegeChoice 529 literature and an Institutional Relationship Manager profile.



CollegeChoice529*
DIRECT SAVINGS PLAN



The benefit of 529 plans — with less paperwork, cost, and effort.

See reverse for important legal information

For more information about the CollegeChoice 529 Direct Savings Plan (“CollegeChoice 529”), call 1.866.485.9415 or visit www.collegechoicedirect.com to obtain a Disclosure Statement, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Ascensus Broker Dealer Services, Inc. (“ABD”) is Distributor of CollegeChoice 529.

If you are not an Indiana taxpayer, 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 529 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 529’s Portfolios invest in: (i) mutual funds; or (ii) an FDIC-insured omnibus savings account held in trust by the Authority at Sallie Mae Bank. Except for the Savings Portfolio, investments in CollegeChoice 529 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, depending on market conditions, you could lose all or a portion of your money by investing in CollegeChoice 529. 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.

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