



Meet your CollegeChoice 529 source for information, events, and much more!

## Phillip Waddles

Phillip Waddles is the Senior Institutional Relationship Manager for the CollegeChoice 529 Direct Savings Plan. His keen understanding of 529 plans in general, and CollegeChoice 529 in particular, make him a valuable resource for spreading the word about the importance of college savings.

Phillip brings passion, excitement, and commitment to the topic of saving for college, and can inspire any audience to take action to prepare for higher education.

Phillip has vast experience in working with organizations and individuals about college savings:

- Over 10 years of experience in Financial Services.
- Educational background:
  - Masters of Business Administration (MBA) from Indiana State University.
  - Bachelor of Arts (BA) Public Relations/Business Management from Pittsburg State University.
- FINRA Series 6 and 63 licenses.

Mr. Waddles is a registered representative of Ascensus Broker Dealer Services Inc., 877-529-2980, 95 Wells Ave, Newton MA (member FINRA/SIPC) and is not employed by the State of Indiana.

**Phillip is available to speak with your constituents. Here are a few examples of how he can help support your efforts at work and in the community:**

### **For employers**

- Discussing the benefits of payroll deduction<sup>1</sup>
- Assisting HR/Payroll departments with initiating payroll deduction
- Leading seminars for employees on saving for college and the benefits of CollegeChoice 529
- Staffing benefits fairs
- Providing educational materials for staff and employees

### **For community leaders**

- Leading workshops on saving for college
- Speaking at PTA/PTO meetings
- Staffing a table at a community fair to spread the word about the importance of saving for college

To schedule a visit or speaking engagement with Phillip, please submit an online request at [indianas529.com](http://indianas529.com) (**Upcoming Events**), send an email to [indianaemployer@ascensus.com](mailto:indianaemployer@ascensus.com), or call **1.866.485.9383**.

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

**For more information about the CollegeChoice 529 Direct Savings Plan ("CollegeChoice 529"), call 1.866.485.9415 or visit [www.collegechoicedirect.com](http://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.**

**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.**