

# Enhanced Capabilities. Greater Opportunities.

Prepare for Your  
Upgraded College  
Savings Experience.

**T. Rowe Price**  
**COLLEGE  
SAVINGS PLAN**  
Offered by THE EDUCATION TRUST OF ALASKA



## In May 2024, the T. Rowe Price College Savings Plan will undergo a transition to a new online and mobile experience.

This transition is part of our commitment to improving the overall account holder experience and ensuring that saving for college is convenient and accessible for all account holders. It will allow us to introduce several enhancements to improve your college savings experience.

T. Rowe Price will continue to serve as the plan's program manager. Your investments and portfolio options in the plan will stay the same, and your current automatic monthly contributions will remain unchanged.



## Overview of Plan Enhancements

You asked, and we listened. Introducing an improved online account and mobile experience with expanded gifting capabilities.



**Improved Online and Mobile Experience:** We've updated the online and mobile experiences to facilitate efficient management of your account while providing you with enhanced experiences to accomplish your goals. Enjoy streamlined account management with upgraded features and a new app for easy account access.



**New Online Gifting Tool:** We are introducing a new gifting tool that enables you to easily and securely share the opportunity for friends and family to contribute to your beneficiary's account while providing you with improved gift tracking capabilities.



**Electronic Distributions to More Than 800 Educational Institutions:** Easily and securely make online payments directly to your eligible institution.

# What You Need To Do

## 1 REESTABLISH YOUR ONLINE ACCOUNT ACCESS

You must reestablish your online access by creating a new username and password after the transition is complete on May 13, 2024, to continue accessing and managing your account online.

- To reestablish your online account access, visit [troweprice529.com](https://troweprice529.com) on or after May 13, 2024, click Log In, and create a new username and password to continue accessing and managing your account online.
- Review and reconfirm your document delivery preferences and establish your investment allocation percentages. The new platform combines your delivery preference for statements and Plan Disclosure Document updates into one election.

If you haven't established online access yet, we encourage you to do so after the transition to take advantage of the new enhancements.



## 2 TAKE NOTE OF YOUR NEW ACCOUNT NUMBER

After the transition is complete on May 13, 2024, you will receive a new account number by mail. Or, if you have selected electronic delivery of documents, a confirmation statement with a new account number will be accessible in your online account.

### ■ About Your New Account Number:

Rather than separate account numbers for each investment option for each beneficiary, you will have one account number for yourself and a two-digit extension representing each of your beneficiaries. Your new account number will be a nine-character alphanumeric string beginning with A7, followed by your main account number, and ending with a two-digit extension distinguishing each of your beneficiaries. If you have only one beneficiary, the extension is 01; for each of your subsequent beneficiaries, it is 02, 03, etc. Example: A7XXXXXXXX-01, A7XXXXXXXX-02, etc.

## 3 REVIEW YOUR ACCOUNT

Your account information, including account history, account preferences, automatic monthly contributions, and investment selections, will automatically transition to the new platform.

- If you are currently contributing to your account through payroll direct deposit, you will receive a separate mailing with transition instructions. If you do not receive this mailing, contact us for assistance. Due to changes in account and bank routing information, any direct deposit contributions submitted by your employer on your behalf after the start of the transition will be returned unless you reestablish direct deposit contributions.
- If you're currently making contributions through bill pay via your bank, you will need to update the payment instructions with your new T. Rowe Price College Savings Plan account number and address: PO Box 219124, Kansas City, MO 64121.
- Destroy any T. Rowe Price College Savings Plan contribution slips you may have. New contribution slips will be periodically provided.

# Transition Timeline



**THURSDAY, MAY 9, 2024**

**Online account access will be unavailable beginning at 4 p.m. ET.** No transactions will be processed (regardless of the method by which they are submitted) if submitted after 4 p.m. ET until after the transition to the new platform is complete.

- Your account, including records and access to assets, will automatically transition to the new account platform.
- You will receive a confirmation statement with your new T. Rowe Price College Savings Plan account number by mail shortly after the transition is complete, or if you have elected electronic delivery of documents, a confirmation statement will be accessible in your account online.

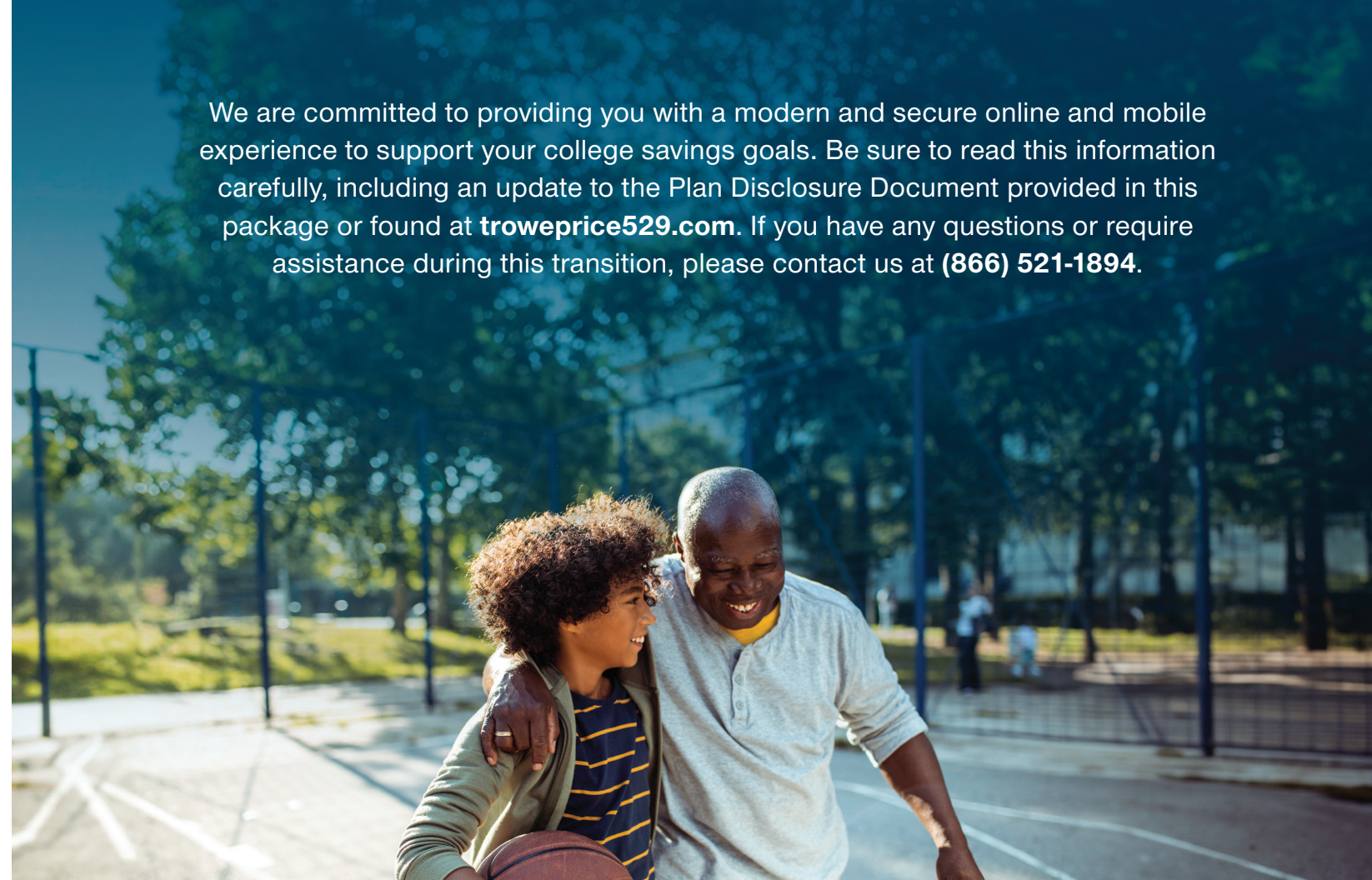


**MONDAY, MAY 13, 2024**

**Activity resumes as normal.** You will need to establish your username and password. The contact information for the T. Rowe Price College Savings Plan will be as follows:

- **Regular Delivery Address:**  
T. Rowe Price College Savings Plan  
PO Box 219124  
Kansas City, MO 64121
- **Overnight Delivery Address:**  
T. Rowe Price College Savings Plan  
1001 E 101st Terrace, Suite 200  
Kansas City, MO 64131
- **Phone Number:** (866) 521-1894
- **Website:** [troweprice529.com](https://troweprice529.com)
- **Email:** [clientservice@troweprice529.com](mailto:clientservice@troweprice529.com)

We are committed to providing you with a modern and secure online and mobile experience to support your college savings goals. Be sure to read this information carefully, including an update to the Plan Disclosure Document provided in this package or found at [troweprice529.com](https://troweprice529.com). If you have any questions or require assistance during this transition, please contact us at **(866) 521-1894**.



*The T. Rowe Price College Savings Plan is offered by the Education Trust of Alaska. You should compare this plan with any 529 college savings plan offered by your home state or your beneficiary's home state and carefully consider, before investing, any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in the home state's plan. Call or go online to obtain the Plan Disclosure Document, which includes investment objectives, risks, fees, charges and expenses, and other information that you should read and consider carefully before investing. T. Rowe Price Investment Services, Inc., Distributor/Underwriter.*

**Together, let's get started.**

**[troweprice529.com](https://troweprice529.com) | (866) 521-1894**

