529 QuickView®

Ease of Enrollment and Access to Your Client Accounts

SSgA Upromise529
POWERED BY SPDR ETFs

Administered by
Nevada State Treasurer

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Access the Client Information You Need with 529 QuickView®

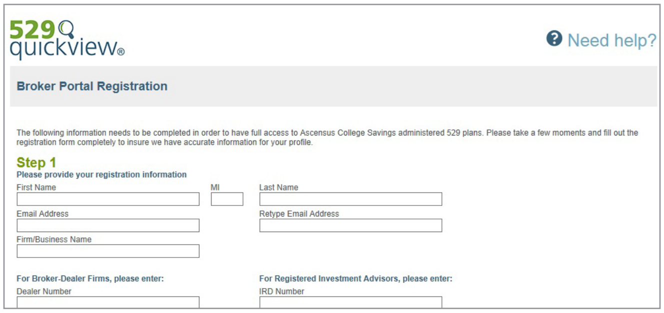
529 QuickView®, 529quickview.com, is a web-based portal that gives investment professionals immediate online access to clients' Ascensus Broker Dealers Services, Inc-administered 529 plans. And once you are registered on 529 QuickView®, client enrollment is simple and quick. 529 QuickView® is user-friendly and password protected so only authorized personnel have access to your clients' information.

529 QuickView® allows you to:

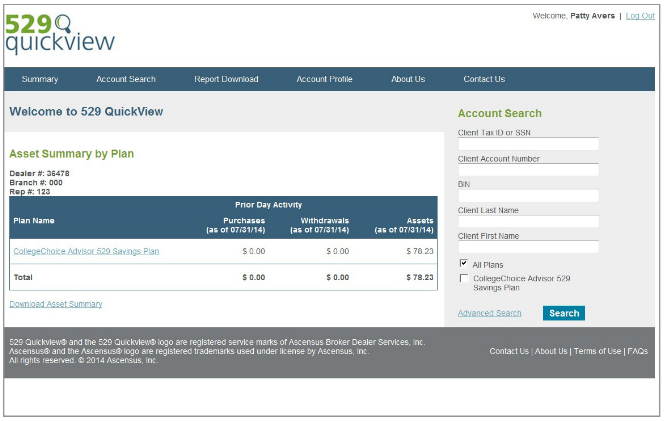
- Enroll clients easily online
- View daily account balances
- Access participant account details
- Download statements, confirmations and tax forms
- View allocation management details
- Conduct online transactions

GETTING STARTED

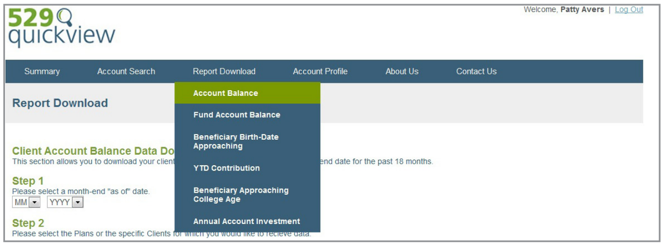
Go to 529quickview.com and follow the ‘click here’ link under the login box to register. (You only need to complete this step the first time you visit the site.)



Once the completed form is submitted, you will be notified by email within 24 hours regarding your 529 QuickView® registration. When registration is complete, you will be able to view current account details or enroll new 529 clients.



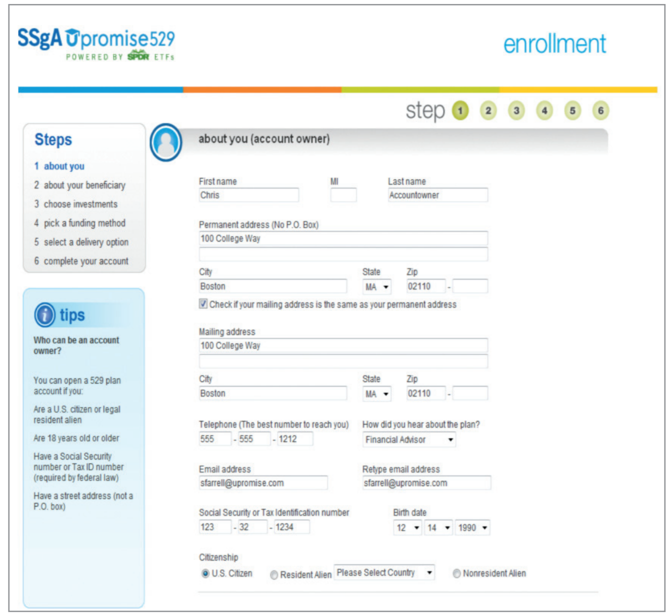
Once registration is complete, you can view client activity summaries and daily account balances. You can also choose the Data Download link to view reports such as:



- Client Account Balance
- Client Fund Account Balance
- Beneficiary Birth-Date Approaching
- Beneficiary Approaching College Age
- Year-To-Date Contributions
- Annual Account Investment

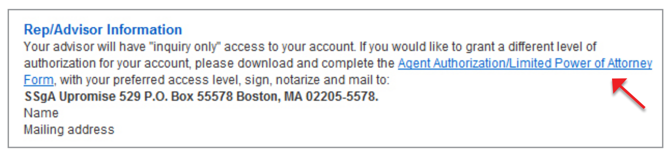
TO ENROLL NEW 529 CLIENTS

If you are enrolling your first account with the SSgA Upromise 529 Plan, visit ssga.upromise529.com and click on the "Open a 529 Account" to complete registration. Once you have at atleast one account open with the SSgA Upromise 529 Plan, you can easily register and enroll future accounts via 529 QuickView®.

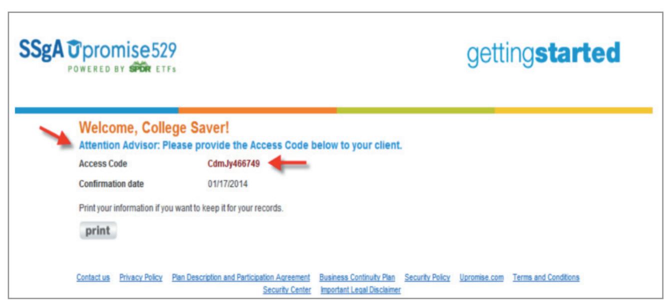


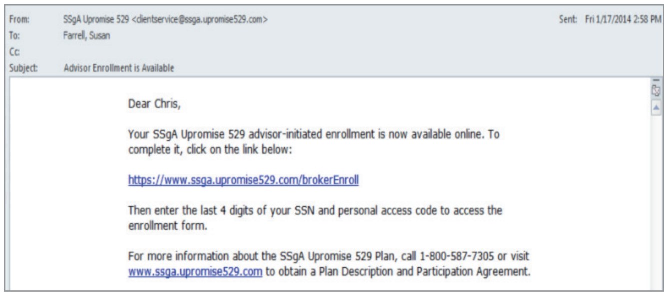
To enroll additional accounts with the SSgA Upromise 529 Plan, login in to 529quickview.com and complete the enrollment form with information from the client. If this is a new account with an existing client some information will be pre-filled; fill in and complete updated enrollment form.

At the review screen before enrollment is saved, there will be a link for Advisors to print the Authorized Agent/Power of Attorney Form to obtain additional access. Advisors will be added to the account as an Authorized Agent and default to an Inquiry-Only level of access.



An access Code will display. The Advisor may print this page and will need to provide the Account Owner with the access code.




From: SSgA Upromise 529 <clientservice@ssga.upromise529.com>
Sent: Fri 1/17/2014 2:58 PM
To: Farrell, Susan
Cc:
Subject: Advisor Enrollment is Available

Dear Chris,

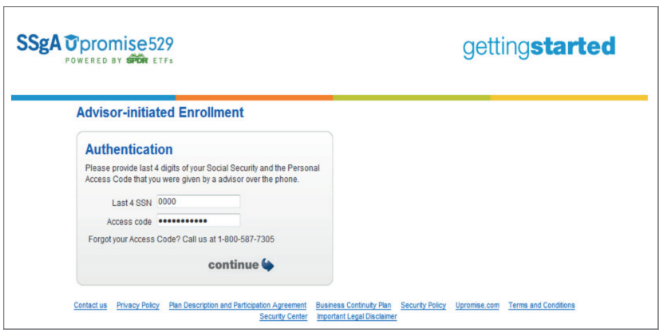
Your SSgA Upromise 529 advisor-initiated enrollment is now available online. To complete it, click on the link below:

https://www.ssga.upromise529.com/brokerEnroll

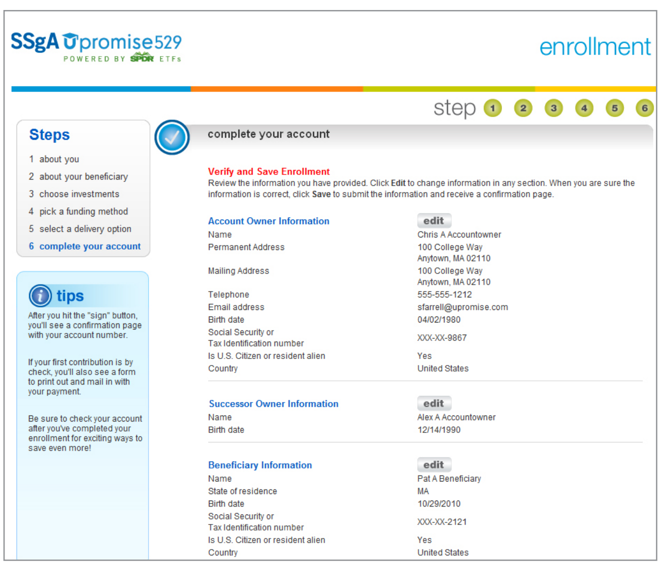
Then enter the last 4 digits of your SSN and personal access code to access the enrollment form.

For more information about the SSgA Upromise 529 Plan, call 1-800-587-7305 or visit www.ssga.upromise529.com to obtain a Plan Description and Participation Agreement.

An email will be sent to the Account Owner containing a link to a landing page to complete the enrollment. The Account Owner will validate the enrollment on the landing page using the Access Code and the last 4 digits of the Account Owner's Social Security number (SSN).



The Account Owner will validate the enrollment on the landing page using the Access Code and the last 4 digits of the Account Owner's SSN.



The Account Owner will land on the Review & Submit screen after login. The Account Owner will review the enrollment and select "edit" to change any information.

If all the information is correct, the Account Owner will click the acknowledgement box and select sign to complete the enrollment

Quick Questions about 529 QuickView®

What is 529 QuickView®?

This web-based portal (529quickview.com) was developed to provide financial advisors with easy and secure access to information on their clients' Ascensus Broker Dealers Services, Inc-administered 529 accounts.

Can I enroll all SSgA Upromise 529 accounts on 529 QuickView®?

An advisor needs to have at least one SSgA Upromise 529 account enrolled through the standard process by visiting ssga.upromise529.com and accessing the "Open a 529 Account" page to complete registration. Once at least one account is opened with the SSgA Upromise 529 Plan, advisors can easily register on 529 QuickView® and enroll future accounts online.

Do my clients have to give permission for me to access their accounts?

No. As your clients' financial advisor you are automatically granted permission as part of their enrollment in the plan.

What information do I have to provide at registration?

When you register, you will be asked to supply information on your dealer, branch, and representative number (or IRD Number), firm access level, and a client account number(s). Once your registration has been approved, you'll receive access authorization by email.

What is the safeguard for deciding who has access?

During the registration process, you will provide a unique user name and password. The password must meet certain minimum requirements for security purposes. Several validation checks will be conducted prior to providing access to client account information.

Can I download the client information to my computer?

Yes. You can download account balance data to Microsoft Excel.

How secure is this site?

529 QuickView® was created with a focus on security. There are four built-in security factors:

- 128-bit SSL encryption
- Password protection (6-12 characters, letters and numbers)
- Timeout of authentication sessions
- Strict registration requirements

Are there any technical requirements for using 529 QuickView®?

No. You just need access to a web browser.

Manage your SSgA Upromise 529 client accounts with ease. Get started today at 529quickview.com

For technical questions about 529 QuickView® including access, password resets or computer related issues, please call 1-888-823-4348.

For questions on setting up a SSgA Upromise 529 account or on SPDR ETFs, please call 1-866-967-2776.

SSGA UPROMISE 529 PLAN
P.O. Box 55578
Boston, MA 02205-5578

1-800-587-7305
ssga.upromise529.com

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IMPORTANT RISK INFORMATION

Information represented in this piece does not constitute legal, tax, or investment advice. Investors should consult their legal, tax, and financial advisors before making any financial decisions.

For more information about the SSgA Upromise 529 Plan ("the Plan") download the Plan Description and Participation Agreement or request one by calling 1-800-587-7305. Investment objectives, risks, charges, expenses, and other important information are included in the Plan Description; read and consider it carefully before investing. Ascensus Broker Dealer Services, Inc. ("ABD") is distributor of the Plan.

Before investing in the Plan, you should consider whether your or the beneficiary's home state offers a 529 plan that provides its taxpayers with favorable state tax and other benefits that are only available through investment in the home state's 529 plan.

The SSgA Upromise 529 Plan (the "Plan") is administered by the Board of Trustees of the College Savings Plans of Nevada (the "Board"), chaired by Nevada State Treasurer. Ascensus Broker Dealer Services, Inc. (ABD) serves as the Program Manager. ABD has overall responsibility for the day-to-day operations, including distribution of the Plan and provision of certain marketing services. State Street Global Advisors (SSgA) serves as Investment Manager for the Plan except for the Savings Portfolio, which is managed by Sallie Mae Bank, and also provides or arranges for certain marketing services for the Plan. The Plan's Portfolios invest in either (i) Exchange Traded Funds and mutual funds offered or managed by SSgA or its affiliates; or (ii) a Federal Deposit Insurance Corporation (FDIC)- insured omnibus savings account held in trust by the Board at Sallie Mae Bank. Except for the Savings Portfolio, investments in the Plan 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, you could lose all or a portion of your money by investing in the Plan, depending on market conditions. Account owners assume all investment risks as well as responsibility for any federal and state tax consequences.

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 ID3428-SA-1493 Exp. Date: 3/31/2016 IBG.UPQV.0315