



The many ways to save with ScholarShare 529



California's Official College Savings Plan: 100% tax-free growth. 100% built for bright futures.

For over 20 years, ScholarShare 529 has been the best choice for families looking for a tax-advantaged way to save for higher education. Studies show that children with \$500 or less designated for college savings are three times more likely to enroll in college and nearly four times more likely to graduate than children with no savings.* To date, ScholarShare 529 has helped families fund more than \$3 billion in higher education expenses. Truly, we couldn't be prouder to play a role in supporting our next generation on their path to a bright future.

WHY SCHOLARSHARE 529?

- A flexible plan: families can pay for a range of college expenses, withdraw money as needed and even switch beneficiaries.
- Boasts fees that are less than half the national average, so a family's savings goes further**
- Administered by the ScholarShare Investment Board, an agency of the state of California, and chaired by the state treasurer
- ScholarShare 529 manages over \$10.5 billion in plan assets across more than 345,000 accounts as of 9/30/2020

PROGRAM BENEFITS:

- Easy for families: start with as little as \$1, set up in just 15 minutes
- 100% tax-free growth
- Diverse set of low-cost investment options
- Flexibility: Funds can be used at any accredited university, college or vocational school nationwide—and many abroad
- Financial-aid friendly
- Extensive education and customer support
- Ugift allows family and friends to contribute

FOR MORE INFO

ScholarShare529.com
800.544.5248

Workplace Savings Program

WHAT IS IT? ScholarShare 529's Workplace Savings Program (WPS) allows employers the chance to help employees save for higher education through payroll deposit, at no cost to the employer.

WHO IS IT FOR? Employers in California and throughout the U.S.

WHAT MAKES IT SPECIAL?

The WPS program features educational opportunities through webinars and on-site presentations so employees can make informed decisions about their college savings. More than 1,000 employers participate in the WPS program.

FOR MORE INFO

ScholarShare529.com/wps
626.432.6300
Gloria.Haring@TIAA.org

Matching Grant Program

WHAT IS IT? The Matching Grant Program (MGP) offers eligible families a kickstart to college savings, with a grant of up to \$225 when opening a new account.

WHO IS IT FOR? Eligible families and organizations interested in partnering with ScholarShare 529.

WHAT MAKES IT SPECIAL?

ScholarShare 529 offers eligible families a matching grant for funds saved for college, and offers partnering organizations educational materials and other support to reach low- to moderate-income families.

MGP's third year of operation kicked off on February 1, 2020.

FOR MORE INFO

ScholarShare529.com/mgp
800.544.5248
ScholarShare@treasurer.ca.gov

Children's Savings Accounts Platform

WHAT IS IT? The Children's Savings Accounts (CSA) platform offers record-keeping technology and sophisticated investment options to help professionally deliver local CSA programs.

WHO IS IT FOR? Local governments and non-profit organizations administering or interested in establishing a CSA program.

WHAT MAKES IT SPECIAL?

Using ScholarShare 529's smart, simple investments for your CSA allows your grants to grow and keeps families' purchasing power from eroding. ScholarShare 529 is an experienced partner for prospective CSA plans.

FOR MORE INFO

ScholarShare529.com/csa
916.651.6380
ScholarShare@treasurer.ca.gov

