

Growing your business just got easier with CollegeBound 529 Employer Plans



Unit classes designed to meet your business goals

Class A @ NAV (Corporate) units³
 Available to all employer plans regardless of size

\$0 minimum investment may make this account accessible to employees of all levels

Helping your employers create a plan that makes the grade

The CollegeBound 529 Payroll Deduction Plan allows employees to directly deposit money from each paycheck into a CollegeBound 529 college savings account.

Adding value and cultivating relationships

529 Employer Plans may help you grow your business by providing valuable college saving resources to your existing clients, help foster new client relationships, and potentially lead to conversations on other investment opportunities.

Employer features

- Little to no cost to the employer
- Competitive employee benefit helps attract and retain talent
- No setup or plan costs
- No company contribution requirement
- Easy administration
- No government reporting

Employee features

- \$0 minimum investment may make this account accessible to employees of all levels
- A quick and easy way to save early and often for college
- Automatic paycheck deductions help employees keep savings on track
- Deduction amounts can be changed or ended at any time
- No additional employee-paid fees¹
- Net asset value (NAV) investing means no upfront sales charge²

1. Standard plan fees still apply. Please refer to the Program Description.

2. NAV only applies to the purchase of A shares. For more information about the types of shares available, visit CollegeBound529.com.

3. Please check with your firm if rollovers at NAV are permissible for CollegeBound 529.

Questions?

Contact your CollegeBound 529 consultant to see how CollegeBound 529 may fit into your business.

[See CollegeBound 529 consultant territory map](#)

Building your business



- 1 529 Employer Plan**
Initial entry to business.



- 2 Employee relationships and referrals**
College conversations can lead to retirement conversations with employees and can also lead to referrals of family and friends.



- 3 401(k) takeover opportunity**
A corporate 529 plan is a relationship-building opportunity with HR departments that may lead to 401(k) takeovers.



James A. Diosa

Rhode Island General Treasurer

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Before investing or sending money for your client, consider whether their 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. For more information about CollegeBound 529, call 877-615-4116 or visit collegebound529.com to obtain a Program Description, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Invesco Distributors, Inc. is the distributor of CollegeBound 529.

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