

CollegeBound 529: The gift of education



Celebrate children's milestones with the gift of higher education savings in lieu of traditional gifts. It's the gift they won't outgrow, and every gift, no matter how small, can make a difference!

Who can open an account for a child?

Anyone! Parents, Grandparents, Aunts/Uncles, Friends.

Who can contribute?

Anyone! Parents, Grandparents, Aunts/Uncles, Friends.

Can contributions be made online?

Yes! You can contribute to a CollegeBound 529 account using Ugift. Ugift is an easy, free-to-use service that lets 529 plan account owners encourage family and friends to celebrate children's milestones with the gift of education.

Account owners receive a unique Ugift code for each beneficiary/student, which can be shared with others and used to contribute at Ugift529.com.

A polite request is effortless with Ugift's email, Facebook and X (formerly Twitter) invitations and with printable gift certificates, children can delight in receiving a tangible gift on that special day.

Are there fees associated with using Ugift?

Ugift is an easy, free-to-use service. Neither the 529 account holder nor the gift giver has to pay any fees for using Ugift. The entire gift amount will be deposited into the student's 529 plan account.

Ugift is a registered service mark of Ascensus Broker Dealer Services, Inc.

Download a printable gift certificate to include with your gift at CollegeBound529.com. Need help politely asking for a contribution? You can download your copy of the CollegeBound 529 insert.



James A. Diosa

Rhode Island General Treasurer

For more information about CollegeBound 529, contact your financial professional, 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.

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.

CollegeBound 529 is administered by the Rhode Island Office of the General Treasurer and the Rhode Island State Investment Commission. Ascensus College Savings Recordkeeping Services, LLC, the Program Manager, and its affiliates, have overall responsibility for the day-to-day operations of CollegeBound 529 including recordkeeping and administrative services. Invesco Advisors, Inc. serves as the Investment Manager. Invesco Distributors, Inc. markets and distributes CollegeBound 529.

Ascensus College Savings Recordkeeping Services, LLC, is a registered transfer agent and is a direct, wholly owned subsidiary of Ascensus College Savings, Inc., and an indirect, wholly owned subsidiary of Ascensus, Inc.

Invesco Advisors, Inc. is an investment adviser; it provides investment advisory services to individual and institutional clients and does not sell securities. Invesco Distributors, Inc. is the distributor for the CollegeBound 529 plan. Each entity is a wholly owned, indirect subsidiary of Invesco Ltd.