

# CollegeBound 529

## Consultant territory map

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■ **Western Territory Consultant**

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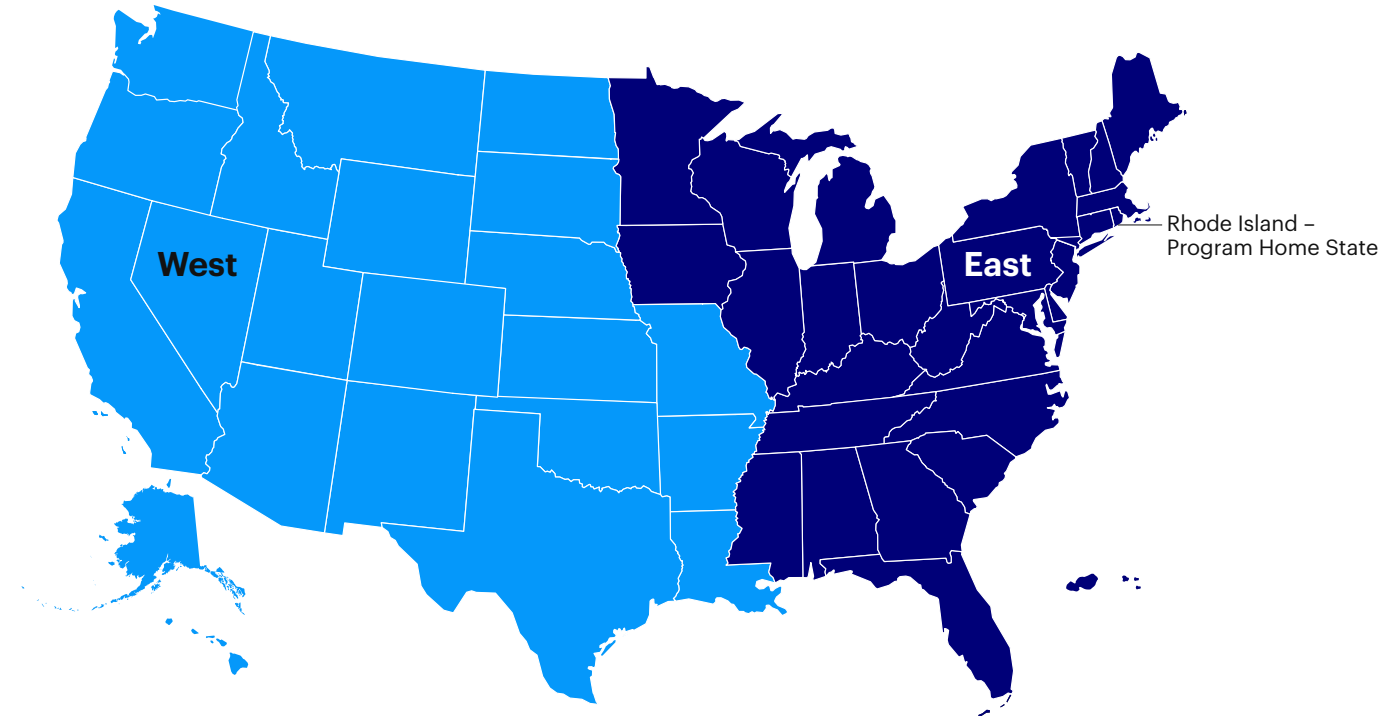
■ **Eastern Territory Consultant**

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For more information about CollegeBound 529, call the dedicated 529 Sales Desk at 800 410 4246.

Not a Deposit | Not FDIC Insured | Not Guaranteed by the Bank | May Lose Value | Not Insured by any Federal Government Agency

Presented by

**CollegeBound 529**

# Things to consider when choosing a 529 plan

## Tax-Parity States

States that offer a state tax deduction for contributing to 529 plans, including both in-state and out-of-state plans:

- Arizona, Arkansas, Kansas, Maine, Minnesota, Missouri, Montana, Ohio, Pennsylvania

## Tax-Neutral States

States that offer no state tax deduction for contributions to a 529 plan:

- Alaska, California, Florida, Hawaii, Kentucky, Nevada, New Hampshire, North Carolina, South Dakota, Tennessee, Texas, Washington, Wyoming

## In-State Tax Benefit

The following states may offer a state tax incentive when contributions are made to the state sponsored 529 plan:

- Alabama, Colorado, Connecticut, Delaware, Dist. of Columbia, Georgia, Idaho, Illinois, Indiana, Iowa, Louisiana, Maryland, Massachusetts, Michigan, Mississippi, Nebraska, New Jersey, New Mexico, New York, North Dakota, Oklahoma, Oregon, Rhode Island, South Carolina, Utah, Vermont, Virginia, West Virginia, Wisconsin

## Program Home State

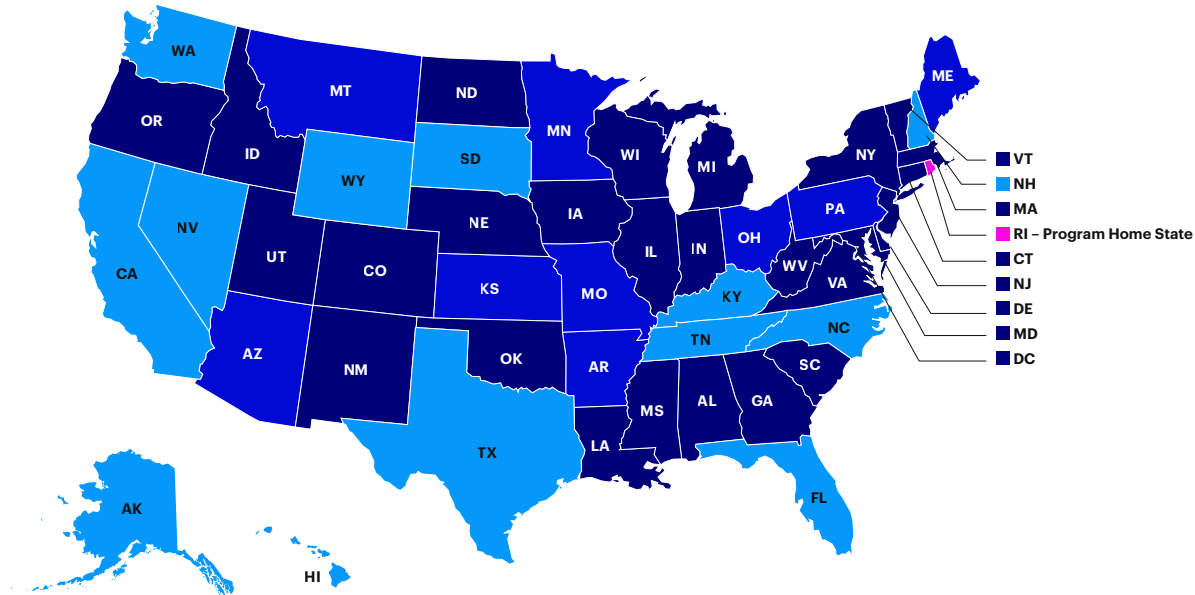
Rhode Island

Unlimited carryforward for excess contributions for Rhode Island residents.

### CollegeBoundbaby

Children born to or adopted by Rhode Island families are eligible for a \$100 CollegeBoundbaby grant.<sup>1</sup>

- Tax-parity states
- Tax-neutral states
- In-state tax benefit
- Program home state/  
In-state tax benefit



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1. Children are eligible for a \$100 CollegeBoundbaby grant to be used for qualified expenses if the request is received by the treasurer within one (1) year of their birth or adoption.

**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 800-410-4246 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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