

WHATEVER SPARKS YOUR
CHILD'S IMAGINATION,
WE HAVE A PLAN FOR IT.

ALASKA529
EDUCATION SAVINGS PLAN



HELP TURN PASSION INTO REALITY.

Every parent dreams of seeing their child soar to new heights, but achieving those dreams requires careful planning and a strong foundation. That's where Alaska 529 comes in, simplifying education savings and offering families a strong start with a **\$250 Dash to Save[®]** incentive.

HERE'S HOW IT WORKS:

- ✓ Open a new account
- ✓ Fund it with at least \$25
- ✓ You could be eligible for a **\$250** incentive contribution.¹

To learn more, visit
Alaska529plan.com/DashToSave.



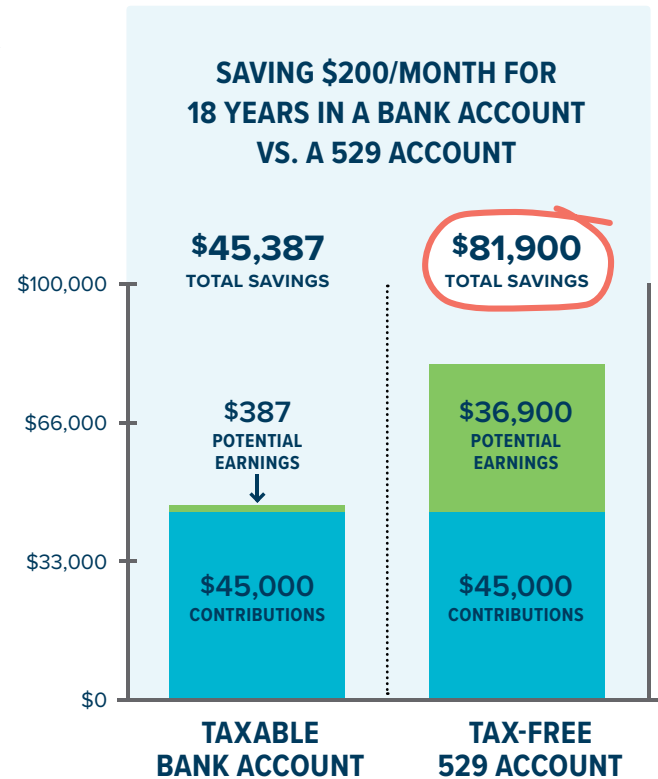
¹Certain restrictions apply; visit Alaska529plan.com/DashtoSave for complete rules. **Dash to Save** and **Dash to Save More** are trademarks of the Education Trust of Alaska.

SAVE TODAY FOR TOMORROW'S DISCOVERIES.

Take the first step with a 529.

A 529 is a tax-advantaged investment account designed to help families save for education expenses. Any investment earnings are tax-deferred, and qualified withdrawals are exempt from federal taxes.²

If you save in a bank account versus investing that same amount in a 529, you could be leaving a lot of money on the table over the course of 18 years. The adjacent chart illustrates the benefits of investing \$200 a month in a tax-deferred 529 account earning 6% versus a taxable bank account earning 0.09%. Over the course of 18 years, the 529 investment account could provide an additional \$30,000 to your beneficiary.³



²The availability of tax benefits may be conditioned on meeting certain requirements, such as residency, purpose for or timing of distributions, or other factors, as applicable.

³Unlike a traditional bank account that offers Federal Deposit Insurance Corporation protection, investments in 529 plans are generally not guaranteed, and you could lose money, including your principal, by investing in them. There may be other material differences between savings accounts and 529 college savings plan accounts that should be considered prior to investing.

A FLEXIBLE, AFFORDABLE PATH TO EDUCATION SAVINGS.



ONE PLAN, MANY PATHS

You can use your Alaska 529 account wherever your loved one's path takes them.

- K–12 Tuition²
- Apprenticeships
- Vocational School
- College
- Loan Repayment
- Continuing Education



CONTROL

You maintain full control over your account, including the flexibility to change your beneficiary at any time, without any annual fees or time restrictions. After maintaining your account for at least 15 years, you can transfer funds to a Roth IRA for the beneficiary, free from taxes or penalties.¹



CUSTOMIZABLE CONTRIBUTIONS

Customize your savings according to your preferences, with the flexibility to adjust frequency and amounts anytime through single or recurring contributions. You also have the option to build your account through the Permanent Fund Dividend.

¹ The amount eligible for rollover each year cannot exceed the IRA contribution limit, and there is an aggregate limit of \$35,000. Please read and/or download the Plan Disclosure Document for additional information at Alaska529plan.com. If you have questions about your specific situation, please speak with a tax professional.

² While withdrawals from 529 college savings plans for elementary or secondary education tuition expenses are federally tax-free, state tax treatment will vary and could include state income taxes assessed, the recapture of previously deducted amounts from state taxes, and/or state-level penalties. You should consult with a tax or legal professional for additional information.



FAMILY AND FRIENDS CAN HELP

Anyone can open or contribute to an Alaska 529 account. Additionally, the online gifting tool, Ugift®, allows loved ones to contribute to your child's account.



UA TUITION BENEFIT

Nonresident beneficiaries may qualify for resident tuition rates at the University of Alaska.



A FORMULA FOR SUCCESS.

Invest a PFD for education.

Whatever career path you or your child might choose, investing a PFD in an Alaska 529 account can help you plan for it. Simply answer “Yes” to the Alaska 529 question on the PFD application and you will be automatically entered to win a \$25,000 scholarship account.¹ You can also choose to save 100% of a PFD. To learn more, visit Alaska529plan.com/PFD.

YOU COULD WIN A
\$25,000
SCHOLARSHIP ACCOUNT¹



Use the PFD Planner to explore the long-term benefits of investing a PFD for education.
Alaska529plan.com/PFDplanner

¹Certain restrictions apply; see the complete rules on our website for details regarding the Scholarship Account Giveaway.



INVESTMENT OPTIONS

When it comes to saving for future education, every family is different.

That's why Alaska 529 offers three investment approaches incorporated into a diverse line-up of active and passively managed portfolios.

- Enrollment-based portfolios offer a mix of stock and bond mutual funds that are periodically adjusted to become more conservative as the enrollment year approaches.
- Static portfolios invest in a predetermined mix of stocks, bonds, and/or money market funds and do not adjust over time.
- Unique to Alaska 529, the University of Alaska (UA) portfolio allows you to purchase UA tuition credits now for future use.



To review all portfolio options, scan or visit:
Alaska529plan.com/InvestmentOptions

IT'S EASY TO GET STARTED.

There are four ways to open an account.



Online

Enroll online at **Alaska529plan.com**.



Through the App

Download the **READYSAVE™ 529** app.



By Mail

Fill out an Alaska 529 Application, found at **Alaska529plan.com**.



Through the PFD

Answer **“Yes”** to the Alaska 529 question on your PFD application.

ALASKA529

EDUCATION SAVINGS PLAN



**MAKING IT EASY FOR PARENTS AND
LOVED ONES TO SAVE FOR EDUCATION.**

ONE PLAN, MANY PATHS.

1-888-425-2752 | Alaska529plan.com

If you are not an Alaska resident, you should compare this Plan with any 529 plan offered by your home state or your beneficiary's home state and consider, before investing, any state tax or other state benefits, such as financial aid, scholarship funds, and protection from creditors that are only available for investments in the home state's plan. Please read and/or download the Plan Disclosure Document, which includes investment objectives, risks, fees, charges and expenses, and other information that you should read and consider carefully before investing, or call 1-888-425-2752 to request a paper copy.

*Offered by the Education Trust of Alaska.
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