



invest529[®]

For Employers

Empower your employees to save for education

Help your employees learn how to save for education for their children, grandchildren or themselves. Offer this benefit to your employees to promote financial wellness and improve overall employee satisfaction.

Employer benefits include:

- ✓ No cost or contract required
- ✓ No administration
- ✓ Employees open and manage their own accounts
- ✓ Invest529 hosted webinars and in-person information sessions
- ✓ Provide materials and resources to promote events and educate employees
- ✓ Streamlined direct deposit process for easy contributions (no payroll deduction)
- ✓ Single point of contact at Invest529 to schedule sessions and request resources

Best practices for sharing Invest529 with employees

Sharing Invest529 resources is simple. Employees learn best when they have access to information about 529s at different times and places. Encourage employees to take action and save for education with these best practices.

- ✓ Schedule a webinar or information session
- ✓ Invite Invest529 to attend a benefit or wellness fair
- ✓ Post an Invest529 brochure to an HR Portal
- ✓ Add a brochure (digital or paper) to new hire orientation
- ✓ Partner internally with an ERG, DEI Council or L&D team to host an information session

Contact your Invest529 representative to learn more:

Merrill Milani, Relationship Marketing Strategist

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Invest529: A great way to save

As a top-rated 529 plan in the country, with millions of savers nationwide, Invest529 has been helping families dream, save and achieve for over 25 years.

Employee benefits include:

- ✓ Open an account with just \$10 and manage accounts online
- ✓ Invest529 accounts fund qualified education expenses at eligible institutions such as colleges, tuition at private or religious K-12 schools, trade schools and apprenticeships
- ✓ Earnings grow free from state and federal taxes when used for qualified education expenses
- ✓ Diverse selection of 20+ investment portfolios to help employees meet their goals and match their investment style

Your employees will appreciate this benefit

Many families and individuals want to save for future education expenses to create a brighter future and avoid costly student loans, but often don't know how to get started or the best way to save.

Employers can help by sharing much needed and desired 529 resources. This simple benefit helps employees achieve savings goals and supports financial wellness. Get started today!

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