





**Roby Smith**  
Iowa State Treasurer

Plan Update October 2024




## Contact Us

 **Email:**  
ISave@isave529.com

 **Phone:**  
(888) 672-9116

 **Social:**  
@ISave529

 **Mail:**  
P.O. Box 219219  
Kansas City, MO 64121-9219



## Account Tip

**Give a meaningful holiday gift.**  
This holiday season, you might be searching for new ways of avoiding another toy to the toy chest. Consider using Ugift - a free, secure online service family and friends can use to put money directly into your child's 529 account. Ugift takes the guesswork out of gift giving this holiday season. Each of your Beneficiary profiles are given a unique Ugift code, which family and friends can use to make direct contributions to your account. The code can be found on your online account and via the READYSAVE™ 529 app.

## 529s Aren't Just for Four-Year Schools

### What path are you saving for?

Traditionally, 529 plans have been synonymous with funding tuition for four-year colleges. However, as the landscape of education continues to expand, these plans can serve a much broader purpose. Today, ISave 529™ covers a variety of educational paths, including K-12 education, trade schools, apprentice programs, colleges and universities in the U.S. and abroad.

Given the increasing costs associated with all forms of education, ISave 529 offers families an essential way to save for their children's future. In a world where career paths are becoming increasingly diverse—ranging from specialized technical positions to creative trades—families should feel empowered to utilize their 529 savings for alternative educational journeys. ISave 529 represents our commitment to making education savings a reality for any student's dream.

## Updates to Investment Options

**Continuing to provide flexibility and professionalism for your investments.**  
Have you checked out our new investment options? How about the updates to some of our age-bands?

On August 26, 2024, two new standalone Individual Investment Options were made available, and we introduced two new age-bands for savers with Beneficiaries aged 15 and 17 in the Aggressive Growth and Growth tracks of our Age-Based Investment Options. These exciting updates were made with you (and your student) in mind, and we are happy to provide even more options to help you meet your savings goals.

If you have questions about your existing investment options or about these updates, contact us at (888) 609-8910 or [isave@isave529.com](mailto:isave@isave529.com).



Take note of our new email address and make sure to bookmark our Contact Us page in case you need help from our education specialists.



(888) 672-9116 | [ISave529.com](http://ISave529.com)

# Year-End Checklist

Set yourself up for success.

Can you believe it's nearly 2025? Start the year off strong with this year-end checklist:

# ISAVE529

## #1: Update Contact info & Delivery Preferences

Ensures tax documents are sent how and where you want.

## #2: Have Ugift Codes Ready for Family & Friends

Prepare for contributions during the gift-giving season.

## #3: Maximize the \$5,500 State Tax Deduction

Take advantage of the lowa income tax deduction and contribute more if you can.

*If you are not an lowa taxpayer, consider before investing whether your or the designated student's home state offers any state tax or other benefits that are only available for investments in such state's qualified tuition program.*

# 2025

Investment returns are not guaranteed, and you could lose money by investing in ISave 529. This material may be used in conjunction with the offering of shares of ISave 529 Plan portfolios only if preceded or accompanied by the current Program Description.



### A Message from State Treasurer Roby Smith

Halloween is upon us, but no tricks here! We might have a new name, but at the core we're still a long-standing 529 plan that helps families just like yours save for education. So, whether your student wants to be a princess, dragon slayer, cartoon character, firefighter or superhero, ISave 529 can help you get them there.

**Roby Smith**  
Iowa State Treasurer  
ISave 529 Administrator

