ScholarShare529 SM

A direct plan that excels in the selection criteria advisors favor.

ScholarShare 529, California's College Savings Plan, provides a broad range of highly rated, low-cost investment options backed by an unwavering commitment to service.

- Passive portfolios including pre-packaged, enrollment year based strategies
- Actively managed funds from leading asset managers
- Rigorous fundamental selection process with independent review
- Expenses less than half the national average for all 529 plans, and about one-third the cost of the nation's largest 529 plan*
- Dedicated advisor support team
- Proven client-ready educational materials

Ascensus QuickView included: one-stop 529 account management for financial professionals

SCHOLARSHARE 529 "continues to stand out for low costs, and its forward-looking overseers should continue to keep the plan at the forefront of industry best practices."

MORNINGSTAR Gold

10/22/19**



CONTACT

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***Source: Strategic Insight 529 College Savings Fee Analysis 4Q 2019. ScholarShare 529's average annual asset-based fees are 0.29% for all portfolios compared to 0.59% for all 529 plans.**
****In an annual review (10/22/2019) of the largest 529 college savings plans (62 total), Morningstar identified 30 plans that rose above their typical peers, awarding those plans Gold, Silver and Bronze Morningstar Analyst Ratings for 2019. These forward-looking, qualitative ratings signal Morningstar's conviction in the plans' abilities to outperform their relevant benchmark and peer groups on a risk-adjusted basis over the long term. Morningstar evaluates college savings plans based on five key pillars – Process, Performance, People, Parent and Price. For more information about Morningstar's overview of ScholarShare 529, go to Morningstar.com. Past performance does not predict future results. Source: Morningstar.com. A Morningstar Analyst Rating for a 529 college savings plan is not a credit or risk rating. Analyst ratings are subjective in nature and should not be used as the sole basis for investment decisions.**

Ascensus 529 QuickView instructions for advisors

1. New Account Application Form: Advisor to complete sections **7A and 7B Registered Investment Advisor (RIA) Information,** then forward directly to ScholarShare 529.
2. If you are not already registered for 529 QuickView, register at 529quickview.com. 529 QuickView is for use by advisors only, not account owners.
3. Authorized ScholarShare 529 accounts will show on your 529 QuickView profile.
4. Subsequent authorizations will automatically appear.
5. Client to follow steps below.

Registered Investment Advisor (RIA) Authorization instructions for individuals

1. If you are establishing a new account online or have an existing account: make sure to complete the **Registered Investment Advisor Authorization** form with your advisor and forward to ScholarShare 529.
2. If you are establishing a new account via paper application: make sure to complete sections **7A and 7B Registered Investment Advisor (RIA) Information** with your advisor and forward to ScholarShare 529.

Questions?

SALES AND ENROLLMENT

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ACCOUNT SERVICE

Customer Service
800.544.5248

529 QUICKVIEW

Call the dedicated
529 QuickView Help Desk
at 888.823.4348 or visit
529QuickView.com

ScholarShare529℠

TIAA **To learn more about the California 529 College Savings Plan, its investment objectives, tax benefits, risks, and costs, please see the Plan Description at ScholarShare529.com. Read it carefully. Check with your home state to learn if it offers tax or other benefits such as financial aid, scholarship funds or protection from creditors for investing in its own 529 plan. Consult your legal or tax professional for tax advice. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss. If the funds aren't used for qualified higher education expenses, a 10% penalty tax on earnings (as well as federal and state income taxes) may apply. Non-qualified withdrawals may also be subject to an additional 2.5% California tax on earnings. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the California 529 College Savings Plan. 1129695**

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