

<b>my529 ( formerlyUESP ) ( UT )</b>	
State Sponsor	Utah
Program Manager	Utah Higher Education Assistance Authority
Investment Manager/Underlying Investments	- Vanguard Mutual Funds - Dimensional Mutual Funds - FDIC-insured accounts held in trust by UESP at Sallie Mae and U.S. Bank - Public Treasurer's Investment Fund
Morningstar Rating 2017	Gold
Morningstar Rating 2016	Gold
Morningstar Rating 2015	Gold
SavingForCollege.com Resident	Cap5.0 as of 01/31/2018
SavingForCollege.com Non-Resident	Cap4.5 as of 01/31/2018
Assets Under Management (\$MM)	\$12,037 as of 12/31/2017
Open Accounts	346,871 as of 12/31/2017
Residency Required	No
How to Purchase	Enroll directly with the program.
<b>State Benefits &amp; Tax Information</b>	
State Tax Deduction	No
State Tax Credit	5%
Max Annual Single State Tax Deduction	\$1,960.00
Max Annual Joint State Tax Deduction	\$3,920.00
Max Annual Single State Tax Credit	\$98.00
Max Annual Joint State Tax Deduction	\$196.00
State Tax Parity	No
<b>Contributions</b>	
Minimum Initial Contribution—Resident	\$0.00
Minimum Initial Contribution—Non-Resident	\$0.00
Minimum Required Recurring Contribution—Resident	\$0.00
Minimum Required Recurring Contribution—Non-Resident	\$0.00
Minimum Required Subsequent Contribution—Resident	\$0.00
Minimum Required Subsequent Contribution—Non-Resident	\$0.00
Minimum Required Payroll Contribution—Resident	\$0.00
Minimum Required Payroll Contribution—Non-Resident	\$0.00
Maximum Balance Per Beneficiary	\$446,000.00
<b>Investment Options</b>	

Age-Based Options	- Age-Based Aggressive Global (10) - Age-Based Aggressive Domestic (10) - Age-Based Moderate (10) - Age-Based Conservative (10) - Customized Age-Based (10)
Static Options	Available options: 8
Individual Fund Options	Available options: 31

Fees	
Total Asset-Based Fee	0 - 0.21% (pre-set investment options) 0.20 - 0.60% (customized options)
Administrative/State Fee	0%
Distribution Service Fee	0%
Program Management Fee	0 - 0.20%
Fund Expense Ratio	0 - 0.40%
Resident Maintenance Fee	\$0.00
Non-Resident Maintenance Fee	\$0.00

**Oklahoma College Savings Plan**

Oklahoma

TIAA-Tuition Financing, Inc.

- TIAA-CREF

Neutral

Neutral

Neutral

Cap3.5 as of 05/31/2017

Cap3.0 as of 05/31/2017

\$849 as of 12/31/2017

50,444 as of 12/31/2017

No

Enroll directly with the program

Yes

No

\$10,000.00

\$20,000.00

\$500.00

\$1,000.00

No

\$100.00

\$100.00

\$25.00

\$25.00

\$15.00

\$15.00

\$0.00

\$0.00

\$300,000.00

Available options: 8

Available options: 1

Available options: 24

	0.37 - 0.81%
	0.10 - 0.25%
	0%
	0.00 - 0.30%
	0.07 - 0.51%
	\$0.00
	\$0.00