



## Empower your employees to save and pay for higher education

CollegelInvest 529 plans are tax-advantaged savings accounts for education expenses, covering college, trade school and apprenticeships.

### Why Offer This Voluntary Benefit

**Employee-Driven:** Employees self-enroll and manage their own accounts. No enrollment period or need for HR involvement.

**Zero Paperwork:** No administration, cost or reporting.

**Employee 529 Education:** We provide invaluable in-person or virtual sessions, attend benefit fairs and handle all questions and follow-up.

**Broad Employee Appeal:** 529s are for anyone: parents, grandparents, and adult learners. No age or income restrictions.

**Financial Wellness:** Boost employee financial literacy.

**Incentives for Employee Participation:** Free lunch and a \$25 Kickstart Bonus for attendees of our presentation. \$100 bonus contribution to babies born in Colorado in 2020 or later.



### Why Employees Value It

**Simple to Get Started:** Enroll online with as little as \$25. Automatic contributions and direct deposit options are available.

**Versatility:** Pay for college, trade schools, apprenticeships nationwide.

**Tax Benefits:** Tax deduction on contributions and tax-free growth for qualified uses for Colorado residents.

**Investment Choices:** Four investment plans to cater to every type of saver.

