

my529TM

UTAH EDUCATIONAL SAVINGS PLAN

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What's that in the sky?



**Utah Educational
Savings Plan®**



**Is it an
Angel?**

**Is it a choir
member?**



No, It's a college graduate!



my529[®]

The “Idea”

- New product called “mystyle” at credit union
- Utah Educational Savings Plan is a mouthful
- Supports the concept of not having to
 - Attend a Utah school
 - Be a Utah beneficiary
 - Be a Utah account owner
- Internal discussions for 12 plus months
- Updated website with new colors, look and feel

The Process

- Checked enabling statute for authority
- Hired a public relations firm to assist with rebranding
- Designed new logo
- Inventory of branded “stuff”
- Develop media plan

The Considerations

- Strength of existing brand identity
- Impact to account owners
- Confusion in the marketplace
- Does your logo need to be changed
- What are the rebranding costs
 - Replacing collateral
 - Media buys

The Outcome

- Favorable reception by account owners
- Recognition at outreach events
- Debrief with PR firm is later this week



Washington's 529 Savings Plan



New savings plan

- Launched in June

Partnered with BNY Mellon and Sumday



BNY MELLON



➤ A BNY MELLON COMPANY

Steps

- Conversations with program staff
- Created mock-ups
- Brought team leads together for feedback
- Incorporated feedback
- Focus groups with program staff
- Finalized brand

We're not just helping people save money, we're helping them secure an idea.



DreamAhead
COLLEGE INVESTMENT PLAN



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Dream big. Plan ahead.

With a DreamAhead College Investment Plan, you can start planning, save for college, and invest for a brighter future.

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The basics at a glance



About 529 plans

These tax-advantage savings plans are sponsored by states to help you start saving for college early on.

[Learn more about 529 plans](#)



How we're different

The DreamAhead College Investment Plan is open to anyone in the U.S., easy to manage, and simple to use. You can open a new account or roll over your 529 account.

[Explore DreamAhead](#)



How to get started

See what basic information you'll need to register and learn the steps to set up an account. It only takes \$25 to start investing.

[See how to get ready](#)



Choose the right investment

No matter your timeline, budget or goal, there's an investment strategy to meet your needs. Learn the differences between Static investment portfolios and Year of Enrollment investment portfolios.

Your brand is more than what you are, it's who you are.