Richard Ellis, Senior Director, my529 August 1, 2018



What's that in the sky?



Utah Educational Savings Plan®



Is it an Angel?

Is it a choir member?



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No, It's a college graduate!



my 529°

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 you 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

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Washington's 529 Savings Plan

New savings plan

Launched in June

Partnered with BNY Mellon and Sumday



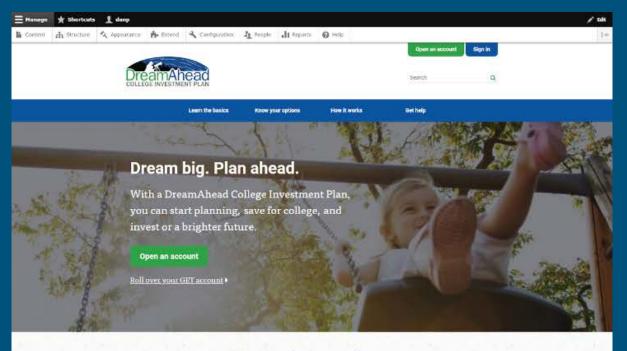


Steps

- 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.





The basics at a glance



About 529 plans

These tax-advantage savings plans are spinismed 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 anymore in the U.S., easy to manage, and simple to use. You can open a new account in roll over your DET 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 malter your rimeline, budget or good, there's an investment strategy to meet your needs. Learn the differences between Static investment portfolios and Year

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