

About my529[®]

my529, Utah's educational savings plan, has been helping families invest for future educational costs for more than 25 years



MORNINGSTAR

TOP RATING
for 13 consecutive years

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. Morningstar does not represent its analyst ratings to be guarantees. Please visit Morningstar.com.

OUT OF 54 PLANS RATED, my529 was one of only two plans to earn a Gold rating

MORE THAN
\$21.9 BILLION
ASSETS UNDER MANAGEMENT

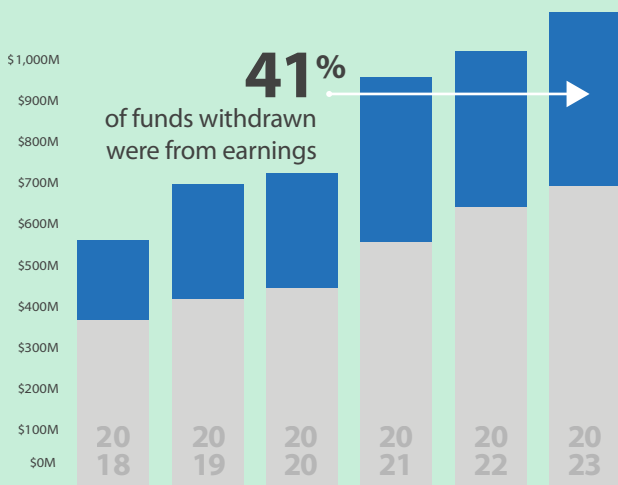
ACCOUNT BALANCE

\$41k
Average

\$14k
Median

MORE THAN
529k
ACCOUNTS

EARNINGS ARE HELPING FUND EDUCATION



2022
STATE TAX CREDIT

21,463
RETURNS THAT USED A
STATE TAX CREDIT

\$4.52M
\$211 AVERAGE

Total credit/deduction from all Utah tax returns that took advantage of the credit

\$112.5M
WITHDRAWN BY UTAHNS WHO PUT
THE MONEY BACK INTO THE ECONOMY

