



529 Rollout:

A step-by-step guide to help employers roll out Ohio's 529 Plan

1

Schedule format & date for 529 information session

Coordinate the session format (**live meeting, conference call, or webinar**), date, time, and location with your Ohio Tuition Trust Authority representative. Your contact will provide the presentation and marketing materials. Allow one hour for the session which will include a presentation as well as time for questions and answers.

2

Inform your employees

Let your employees know about the new benefit and payroll deduction for CollegeAdvantage, Ohio's 529 Plan, by sending out an introductory email (see sample email below).

Consider sending out a reminder email no less than 24 hours prior to the date of the scheduled event.

We would like to roll out a new employee benefit program and payroll deduction for CollegeAdvantage, Ohio's 529 Plan.

(Insert name of staff) will work with a representative at the Ohio Tuition Trust Authority to help educate our employees about CollegeAdvantage and establish their direct deposit. We will be providing (insert session format) for employees to learn more about Ohio's 529 Plan—its features and benefits.

We are pleased to provide this voluntary benefit elective as a commitment to our employees' financial health, and provide payroll deduction for those with a new or existing 529 account.

For those interested, an information session will be held on (insert session date, time & location).

We encourage your participation.

CollegeAdvantage is a 529 college savings plan offered and administered by the Ohio Tuition Trust Authority, a state agency. To learn more about CollegeAdvantage, its investments, risks, costs, and other important information, read the Plan's Offering Statement and Participation Agreement available at CollegeAdvantage.com. If you are not an Ohio resident or taxpayer, learn if your home state offers state tax or other benefits for investing in its own 529 plan.



3 **Make sure benefit logistics are in place**

List CollegeAdvantage on employee benefit information. Include our website CollegeAdvantage.com and our phone number **1-800-Afford-It**. We will provide administrative support so you do not have to shoulder any of the questions.

Ensure payroll is aware of this new employee benefit and are familiar with the 529 payroll deduction form. Be sure that payroll can add the line item.

Although you can create your own payroll form, our process offers account owners a printed form after they sign up for their 529 account on our website. Using this form will ensure accuracy of information.

4 **Receive & share ongoing content from Ohio Tuition Trust Authority**

Communication content is geared for both those who already have 529 plans and those who have yet to sign up. Monthly communications will be in the form of blogs, emails, and web links that you can share with your employees.

5 **Include us at your yearly benefit fairs**

Include us at wellness events and benefit fairs for continued support.

At any time, you can request any of our marketing materials and representation for lunch-and-learns.



Contact:

Janet Smith

Marketing Representative – Employers
Ohio's 529 Plan, CollegeAdvantage

(614) 387-5426

jsmith@CollegeAdvantage.com

CollegeAdvantage.com

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