How much time do you spend looking for client account information? What does that time cost you in productivity? 529 QuickView is a data-delivery website that gives you immediate online access to your clients' Ascensus College Savings-administered 529 plans.

529 QuickView is easy to use and password-protected so only authorized personnel have access to your clients' information.

Best of all, you're never alone if you have questions

For technical questions

including access, password resets, and computer-related issues call the dedicated 529 QuickView help line at **1.888.823.4348**, **Monday through Friday from 8:00 a.m. to 8:00 p.m. Eastern Time.**

For questions related to client accounts or plans

please contact the respective toll-free service line for that plan.

Ascensus College Savings is the leading 529 administrator in the nation. Our mission is to make it simple and easy for all Americans to save for college.

For further information on 529 QuickView or any Ascensus College Savings solution, please contact us at **1.888.823.4348.**

529 quickview® | ascensus™ college savings

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Access the client information you need with **529 QuickView**

An online service from Ascensus College Savings

529 quickview®

529quickview.com

- Your easy, secure, one-stop source for 529 client account information
- Set up automatic contributions, request distributions, and make transfers
- Forge closer client relationships and build assets
- Search, sort, and download client data quickly

It only takes a few minutes to get started

Step 1

Go to www.529quickview.com

- Follow the ‘click here’ link under the login box (you only need to complete this step once)
- After you’ve filled in and submitted the online form, you’ll be notified by email regarding your 529 QuickView registration

Step 2

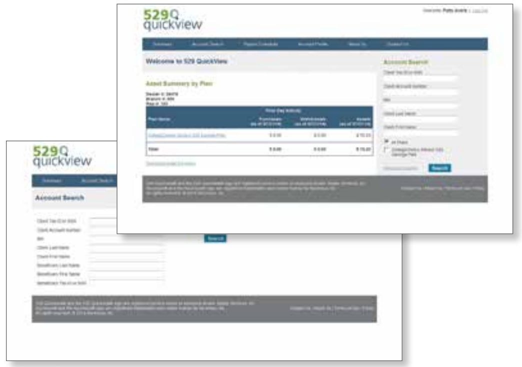
View client activity summaries

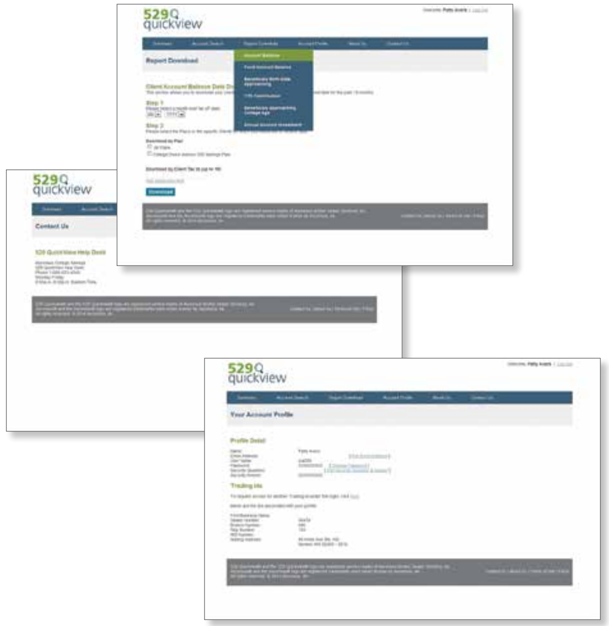
- Access your clients’ 529 activity, including purchases, withdrawals, and assets
- Search for clients by plan, client or beneficiary name, tax identification number, Social Security number, or account number
- View the same screens as your clients at login

Step 3

Access, download, and act

- View daily account balances, including assets by portfolio type, principal, and earnings
- Use the following downloadable reports to generate sales leads:
  - Annual account investment
  - Client fund account balance
  - Approaching beneficiary birthday
  - Year to date contribution
  - Approaching college age
  - Account balance
- Access participant account details (address, phone number, email, beneficiary, interested parties, authorized agents, representative/broker information)
- Conduct online transactions including contributions, qualified withdrawals, allocation changes, annual exchanges, and transfers*
- Download statements, confirmations, and tax forms
- Manage allocation management details, including annual exchange information and transaction history





* Please note that the level of access may vary by plan.

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Quick questions about **529 QuickView**

Do my clients have to give permission for me to access their accounts?

No. As your clients’ financial advisor you are automatically granted permission as part of their enrollment in the plan.

What information do I have to provide at registration?

When you register, you will be asked to supply information on your dealer, branch, and representative number (or IRD Number), firm access level, and a client account number(s). Once your registration has been approved, you’ll receive access authorization by email.

What is the safeguard for deciding who has access?

During the registration process you will provide Ascensus College Savings with a unique user name and password. The password must meet certain minimum requirements for security purposes. Ascensus College Savings will conduct several validation checks prior to providing access to client account information.

Can I download the client information to my computer?

Yes. You can download reports in CSV format for use with any spreadsheet program (e.g. Microsoft Excel):

- Annual account investment
- Client fund account balance
- Approaching beneficiary birthdate
- Year to date contribution
- Approaching college age
- Account balance

How secure is this site?

529 QuickView was created with a focus on security. There are four built-in security factors:

- 128-bit SSL encryption
- Password protection (6-12 characters, letters, and numbers)
- Timeout of authentication sessions
- Strict registration requirements