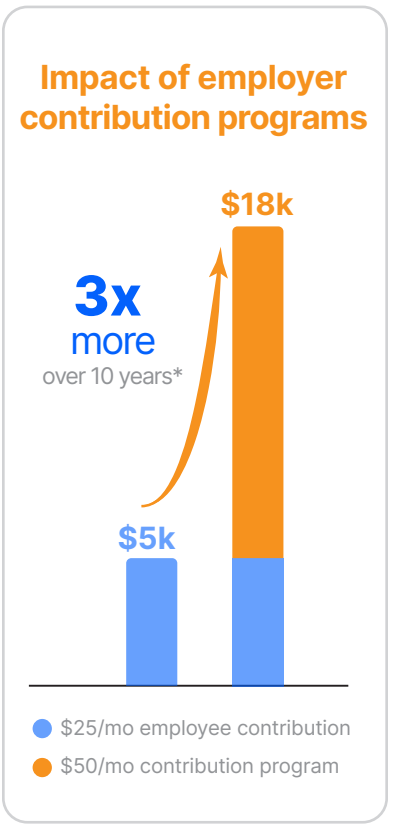
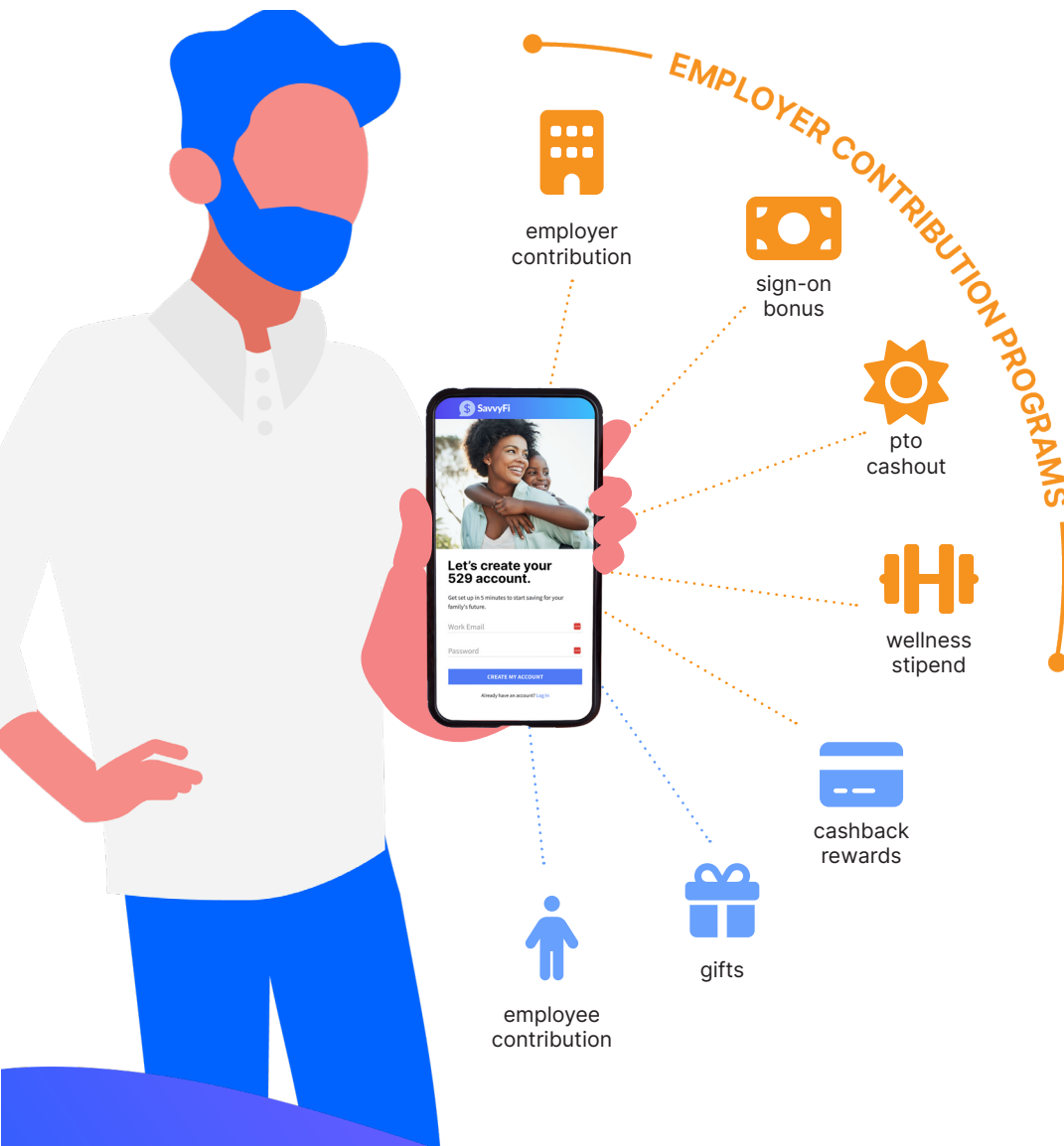


Supercharge your 529 benefit.

Employees meet education goals faster with SavvyFi.



Why SavvyFi?

- ⌚ No integration launch option
- 📱 Easy to use
- ✖ No HR admin required
- 📄 Paper-free enrollment
- 😊 10%+ participation with contribution program

See how SavvyFi benefits you:

SavvyFi.co/employers

*This information is based on hypothetical performance calculations, which are not an indicator of any investor's actual current or future experience and is provided for illustrative purposes only. All investing involves risk, including the loss of money you invest. SavvyFi assumed a tax-adjusted annual growth rate of 8%.

FAQs about 529 plans

What do I need to know about 529 accounts?

529 accounts allow employees to save for K-12 education, trade schools, apprenticeships, and two- and four-year colleges without paying taxes on investment growth.

How do employees enroll?

Employees sign-up using a secure, personalized link. They can open a 529 account and make their first contribution in minutes.

How does SavvyFi benefit all employees?

Parents, grandparents, aunts and uncles, spouses, and friends can use SavvyFi to save for their loved ones. Employees can even open an account to save for their own future education.

What happens if a child decides not to attend college?

If plans change, 529 accounts can be transferred, penalty-free, to a family member, or rolled over into a Roth IRA.

What are examples of employer contribution programs?

SavvyFi can funnel direct employer contributions, sign-on bonuses, PTO cashouts, wellness stipends, and any other contribution programs into employee 529 plans.

Is SavvyFi valuable without a contribution program? How can employees save even more?

Employees can grow their savings more quickly by setting automated monthly individual contributions, receiving gifts from friends and family through their personalized gifting links, and receiving up to 30% cashback for everyday shopping through cashback rewards program.

What is the typical employee participation rate?

Employee participation can range from 10% to more than 50%, depending on the employer contribution program.

How much work does it take me to get started?

With zero paperwork, administrative overhead, or technical integration required, you can be up and running in as little as 24 hours.

How much does SavvyFi cost?

\$5 per enrolled employee per month. There are no minimums or implementation fees.

How it works



Enroll

Employees open a 529 account in minutes.



Fund

They link a bank account and set up contributions.



Invest

Savings are invested in Vanguard funds.



Learn more at SavvyFi.co/employers



**Schedule your
demo today.**

SavvyFi.co/book-a-demo