



## Q1 2025 Marketing Results

# Executive Summary

Q1 2025 business results were mixed, with growth in strong contributions from existing account owners, and reduced new account growth compared to 2024.



- Consumer confidence as measured by the Confidence Board\* fell for the fourth straight month in March 2025, reaching below even its level during peak inflation in 2022. Consumers' near-term outlook for incomes, business, and labor market conditions fell to the lowest in 12 years, and far below the threshold that usually signals a looming recession.
- Q1 advertising messaging was updated to reflect current consumer confidence trends, and preparations were made for the annual 529 Day promotion.
- E-Gifting enjoyed its highest quarterly contribution level ever.

# How 2025 is Shaping Up

- New Account and Contribution Growth as of June 30:
  - New Accounts – 23,219, down 10.2% YoY. Some of the gap seen earlier this year has closed.
  - Total Accounts – 467,738, up 6.5% YoY
  - Contributions - \$704 million, up 8.9% YoY
- 529 Day Promotion Results
  - 1,985 new accounts opened during the promotional window with a qualifying initial deposit of \$50+, a 3.5% decrease versus the 2024 campaign
- Shift in approach to College Savings Month (September)
  - Offer to be featured will incentivize new account openings with lower balance requirements than in previous years to help address lag in 2025's new account trend
- Supporting thought leadership
  - Stephanie Tom and Cassandra DiBenedetto were stand-out speakers at the National Association of State Treasurers (NAST) Conference in Baltimore in June
  - Cassandra's LinkedIn following now exceeds 3,500, and her Instagram channel launched on 7/1

# ScholarShare 529 2025 Marketing Plan – Q1 Achievements

Goal	Strategy	Achievements	
1	<b>Gain New Accounts/AUM</b>	<p>Strategically use technology and marketing resources to grow the plan.</p> <p>Marketing Performance Targets:</p> <ul style="list-style-type: none"> <li>• 6% growth in Total Accounts</li> <li>• 4% growth in Contributions</li> <li>• &lt;2% of Total Accounts closed due to rollovers</li> </ul>	<p><b>Q1 Results</b></p> <ul style="list-style-type: none"> <li>• New Accounts are down 15% versus Q1 2024 New Accounts.</li> <li>• New Accounts are 23% of Annual Target of 50,000.</li> <li>• Total Accounts of 460,495 are up 7% over Q1 2024.</li> <li>• Contributions are up 14% versus Q1 2024 Contributions.</li> <li>• Contributions are 28% of Annual Target of \$1.413 Billion.</li> <li>• 0.38% of Total Accounts were closed due to rollovers.</li> </ul> <p><b>Adjustments to Environment</b></p> <ul style="list-style-type: none"> <li>• New creative developed for declining consumer confidence and buying hesitancy.</li> </ul> <p><b>E-Gifting</b></p> <ul style="list-style-type: none"> <li>• Q1 E-Gift Contributions were the highest ever achieved.</li> </ul>
2	<b>Increase Account Owner Diversity</b>	Leverage targeted media and PR/media relations to increase the diversity of ScholarShare 529 account owners.	CalKIDS and multi-cultural media targeting for ScholarShare ads continue to have a positive effect on diversifying our account owner base. Yet, the reliability of our tracking is declining as consumers are less willing to share information.
3	<b>Cross-sell younger CalKIDS claimants on ScholarShare</b>	Engage CalKIDS claimants with content to spur ScholarShare account openings	Solid progress made toward standing up an email-based content program for the CalKIDS audience.
4	<b>Grow plan via Employers/RIAs</b>	Continue to build relationships with employers (public and private) and registered investment advisors to attract new account owners.	Work continued to automate follow-up emails and other correspondence to prospective WPS partners via Salesforce.
5	<b>Support tenured account owners</b>	Continue to enhance the College Countdown program to serve the needs of mature account owners on the cusp of using their 529 savings.	College Countdown website content was regularly refreshed, and current account owners with beneficiaries age 16+ received a monthly email highlighting new information. A 3-part History of Higher Education video series launched and was being amplified in social media.

# ScholarShare 529 Business Results

## Marketing Performance Targets

- Q1 New Account growth trails Q1 2024 as consumer confidence declines. We may not achieve our 50,000 target for 2025.
- Total Open Accounts of 460,495 are up 6.9% putting us in a good position to meet our marketing performance target of 474,527.
- Q1 Contributions of \$393 million are up 13.8% versus Q1-2024.

Accounts and Contributions	March 31, 2024	March 31, 2025	% Change
Total New Accounts Opened	13,514	11,501	-14.9%
Total New Contributions Collected <sup>1</sup>	\$345 million	\$393 million	13.8%
Growth Rate <sup>2</sup>	ScholarShare 529	Industry	% Difference
Annual Asset Growth Rate excluding CalKIDS/Local CSAs	7.58%	8.05%	-0.46%
Annual Asset Growth Rate including CalKIDS/Local CSAs	8.79%	8.05%	0.74%
Rollovers	Year Ending March 31, 2024	Year Ending March 31, 2025	% Change
% of Plan Accounts Closed Due to Rollovers <sup>3</sup>	0.36%	0.38%	0.02%
Accounts and Assets	March 31, 2024	March 31, 2025	% Change
Total Open Accounts	430,754	460,495	6.9%
Assets excluding CalKIDS/Local CSAs	\$14.1 billion	\$15.1 billion	7.60%
Assets including CalKIDS/Local CSAs	\$14.4 billion	\$16.5 billion	8.8%
Market Share excluding CalKIDS/Local CSAs	4.8%	4.7%	-0.1%
Market Share including CalKIDS/Local CSAs	5.1%	5.2%	0.1%

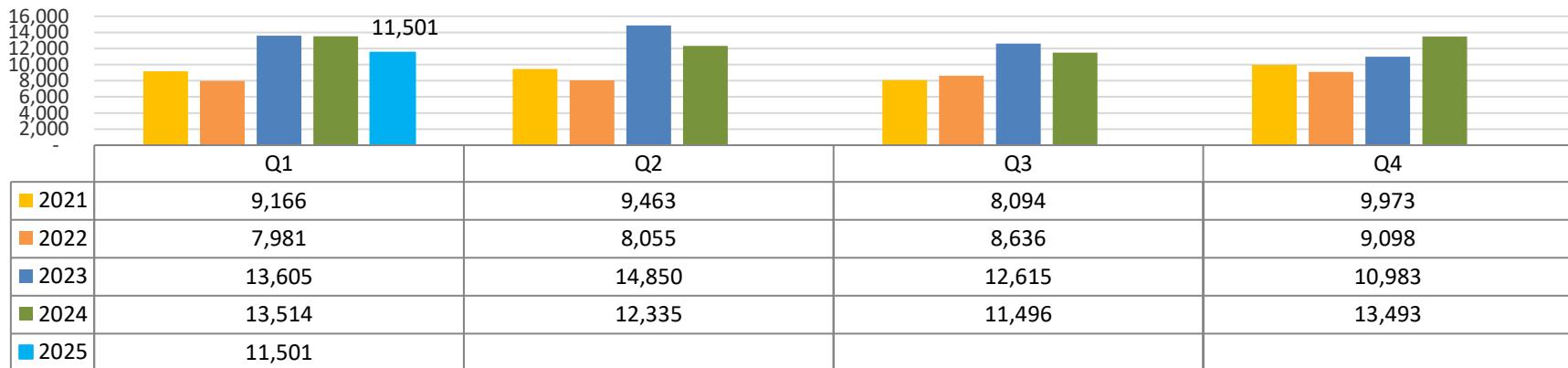
<sup>1</sup> Excludes CalKIDS.

<sup>2</sup> ISS Market Intelligence – Q1 2025. “Industry” represents all Direct Sold Plans.

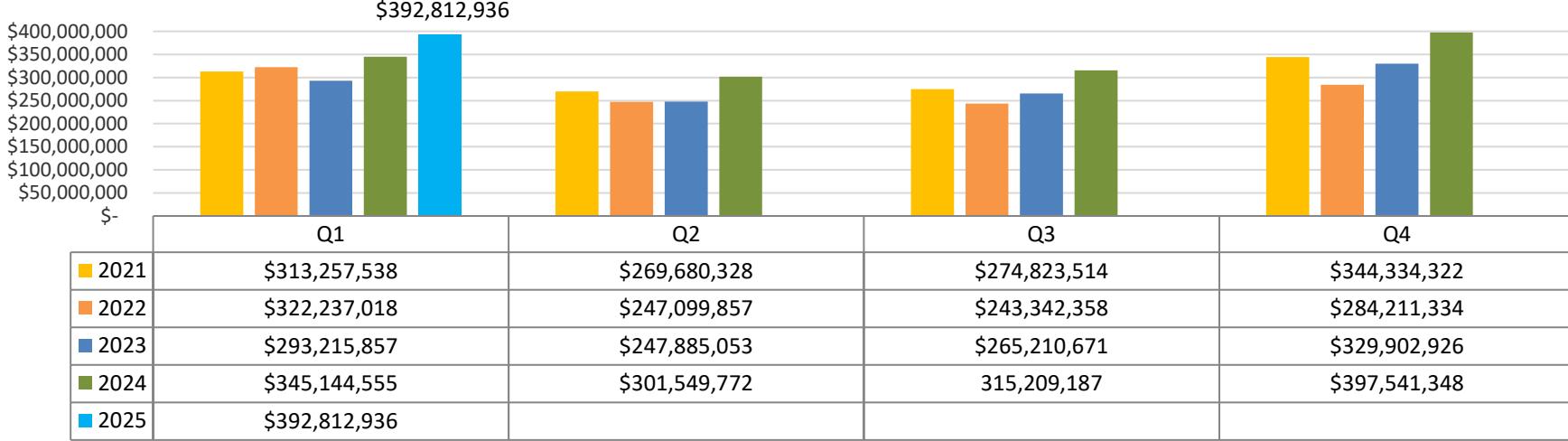
<sup>3</sup> Excludes accounts closed from rollovers to Roth IRAs.

# New Accounts and Contributions

## New Accounts



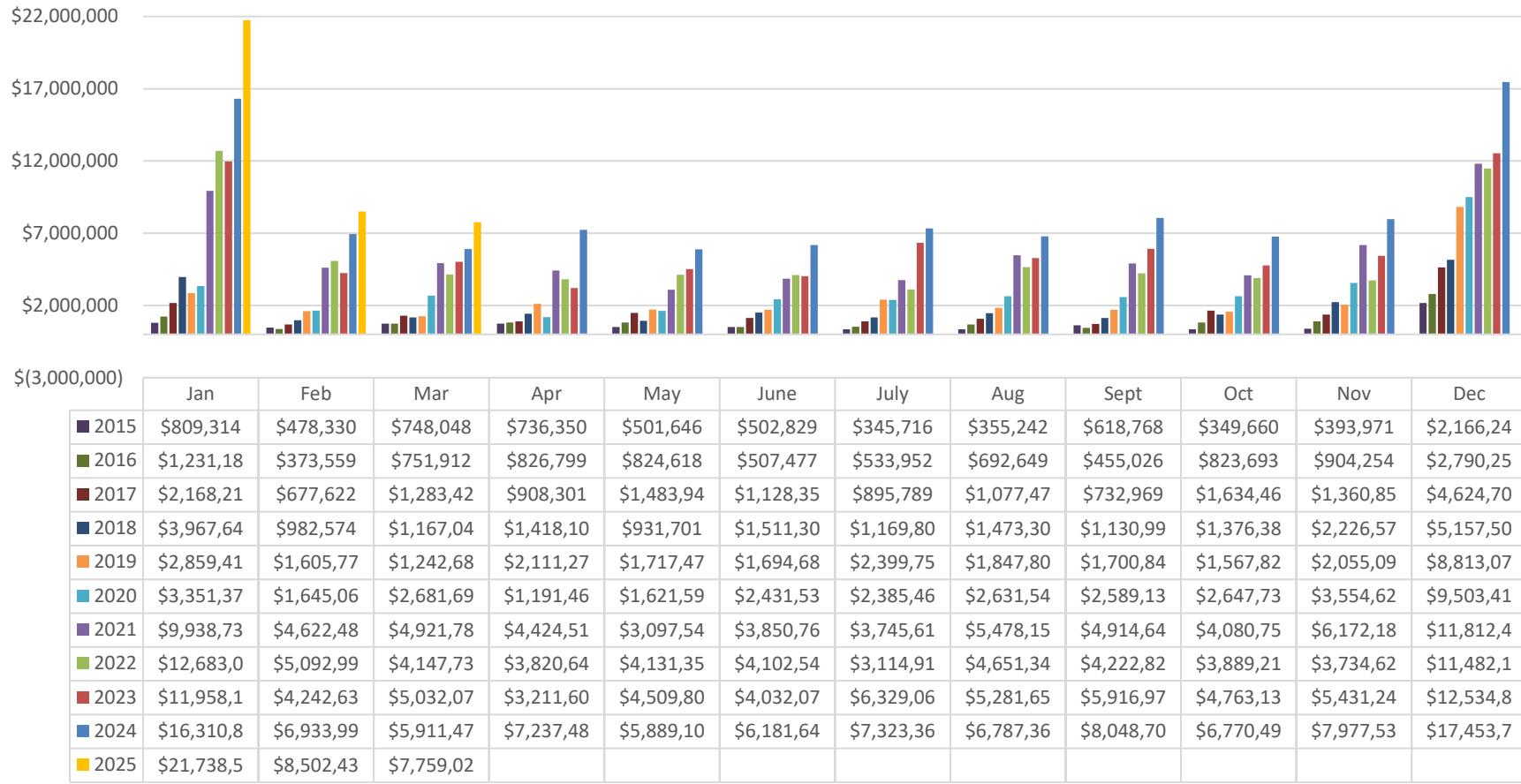
## Contributions



# E-Gifting: Q1 2025 E-Gifting Contributions were the highest ever.

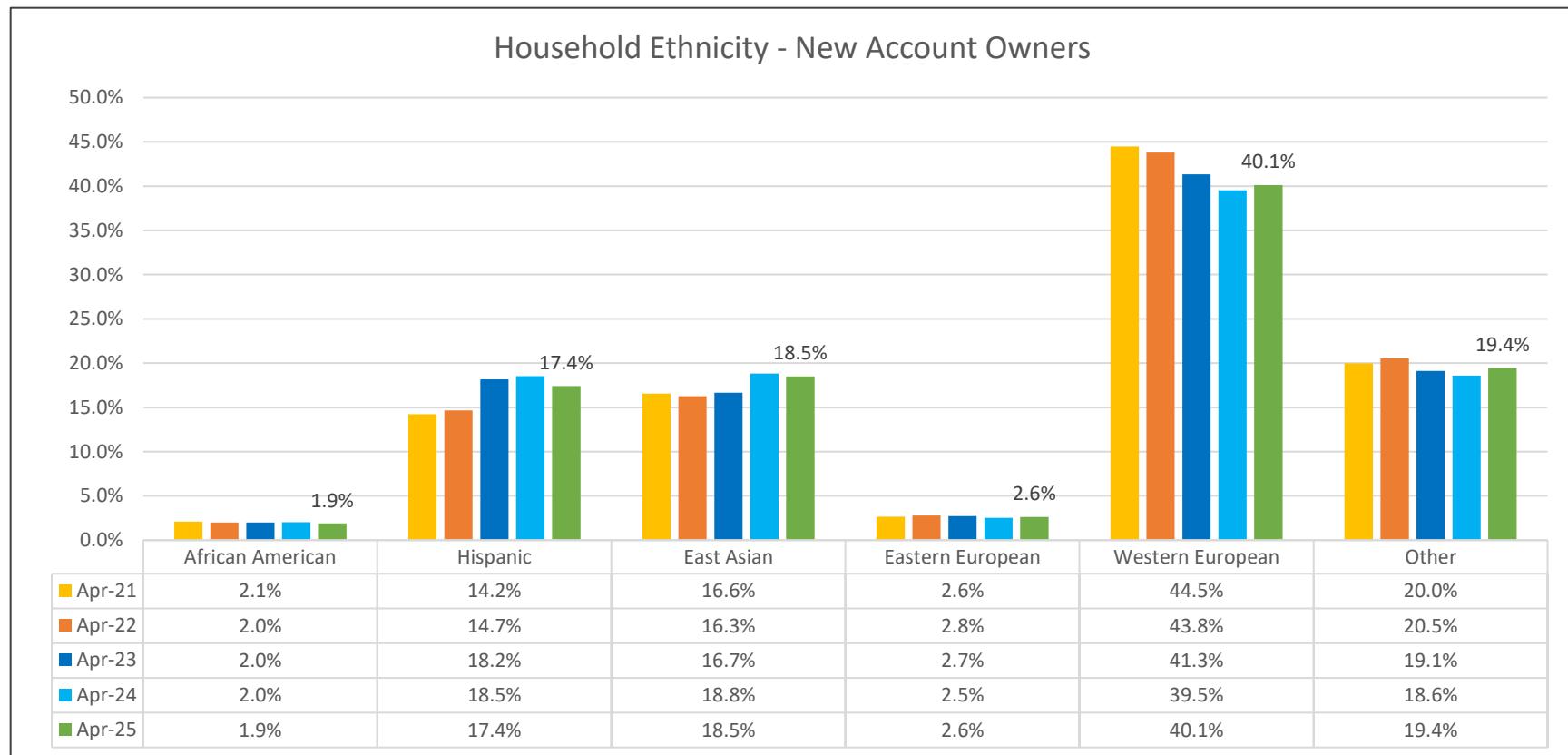


## E-Gifting Contributions



# Household Ethnicity – New Account Owners

The Trump administration's actions on immigration and deportation have significantly impacted data collection on race, ethnicity, and citizenship. Fewer consumers are sharing this information in surveys, and consequently our ability to accurately track participation by ethnicity is declining.



# Employer Outreach Report – Q1 2025

New WPS Partners	
1.	City of La Canada
2.	Haus Labs
3.	Merced County
4.	Public Risk Innovations, Solutions, and Management (PRISM)
5.	Frank Rimerman + Co. LLP
6.	Penske Media Corporation (PMC)
7.	Tesla
8.	City of Fort Bragg
9.	Head Royce School
10.	City of Compton
11.	City of Carson

We **expand** the Workplace Savings Program (WPS) by **partnering** with employers, meeting employees where they are, and delivering **education** that **drives action** and **engagement**.

## Grow

13

WPS Lead Generating Activities

11

New WPS Partners

239

New Accounts

\$6.3M

AUM Support through education

## Educate

45\*

Education activities  
\*5 of 45 conducted in Spanish

218

One-on-One consumer consultations

## News from The Field

### University of California, Berkeley:

At UCB, James Palen hosted a college savings workshop attended by 48 employees, HR surveyed the attendees with 100% of respondents stating the session met or exceeded expectations. The session led to an increase in 1:1 consultations – HR praised the content, James' expertise and the trust built through TIAA – an institution she knows and trusts. Helping strengthen our WPS presences at UCB.

# Driving New Account Growth

Audience	Objective	Tactics and Channels	Cadence
Prospect	<ul style="list-style-type: none"><li>• Awareness</li><li>• Interest</li><li>• Open new accounts</li></ul>	<ul style="list-style-type: none"><li>• Search engine Marketing</li><li>• Display</li><li>• Email</li><li>• Direct Mail</li><li>• Web</li></ul>	<ul style="list-style-type: none"><li>• Seasonal and Evergreen</li></ul>
Inquirers	<ul style="list-style-type: none"><li>• Open new accounts</li></ul>	<ul style="list-style-type: none"><li>• Search engine marketing</li><li>• Display</li><li>• Email</li><li>• Direct mail</li><li>• Web</li></ul>	<ul style="list-style-type: none"><li>• Seasonal and Evergreen</li></ul>
New AO's	<ul style="list-style-type: none"><li>• Fund and engage with account</li></ul>	<ul style="list-style-type: none"><li>• Email</li></ul>	<ul style="list-style-type: none"><li>• Evergreen</li></ul>
Account Owners	<ul style="list-style-type: none"><li>• Continued awareness, engagement and support</li><li>• Fund accounts</li><li>• Open additional accounts</li><li>• Product engagement features</li></ul>	<ul style="list-style-type: none"><li>• Email</li><li>• Display</li></ul>	<ul style="list-style-type: none"><li>• Seasonal and Evergreen</li></ul>

# Tactical Results Year-over Year (YoY)

Audience	2025 Q1 Engagement and Conversion Highlights	2024 Q1 Engagement and Conversion Highlights	YoY Q1 Comparison
Prospect	<ul style="list-style-type: none"> <li>Display ads generated 1,846 account opens and 78.8M impressions. With a spend of roughly \$552K.</li> <li>Prospect Email (EM) campaign generated 108 RC sign-ups and 239 new accounts to date**</li> </ul>	<ul style="list-style-type: none"> <li>Display ads generated 3,107 account opens and 92.5M impressions. With a spend of roughly \$648K.</li> <li>Q1 2024 did not include a Prospect EM campaign.</li> </ul>	<ul style="list-style-type: none"> <li>Display saw a 41% decrease YoY in account opens fueled by economic uncertainty and a 17% decrease in budget.</li> <li>YoY Prospect EM comparison not applicable.</li> </ul>
Inquirers	<ul style="list-style-type: none"> <li>29% EM unique open rate</li> <li>5.9% conversion rate with 49 new accounts generated</li> <li>Total opening balance/first contributions of \$593,738</li> </ul>	<ul style="list-style-type: none"> <li>26% EM unique open rate</li> <li>5.1% conversion rate with 49 new accounts generated</li> <li>Total opening balance/first contributions of \$348,390</li> </ul>	<ul style="list-style-type: none"> <li>EM engagement slightly increased YoY.</li> <li>Q1 conversion rates and new accounts remained consistent YoY.</li> <li>Total opening balance/first contributions increased 70% YoY.</li> </ul>
New Account Owners (AO)	<ul style="list-style-type: none"> <li>40% EM open rate</li> <li>0.7% account upsell rate with 321 new accounts</li> <li>48% RC sign-up</li> </ul>	<ul style="list-style-type: none"> <li>37% EM open rate</li> <li>0.7% account upsell rate with 289 new accounts</li> <li>48% recurring contribution sign-up</li> </ul>	<ul style="list-style-type: none"> <li>EM open rate slightly increased YoY.</li> <li>Account upsell rate remained consistent YoY while new accounts increased by 11%.</li> <li>Recurring contribution remained consistent.</li> </ul>
Account Owners	<ul style="list-style-type: none"> <li>AO engagement had a 45.8% EM open rate and 2.7% click rate</li> </ul>	<ul style="list-style-type: none"> <li>AO engagement had a 36.3% email open rate and 1.9% click rate</li> </ul>	<ul style="list-style-type: none"> <li>AO engagement saw a 26% increase in open rate and 42% increase in click rate.</li> </ul>

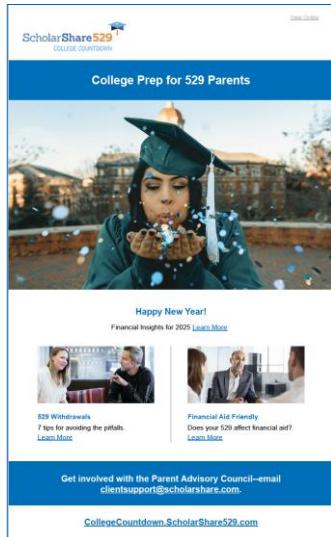
# Q1 Evergreen Creative

## Banners



## College Countdown Emails

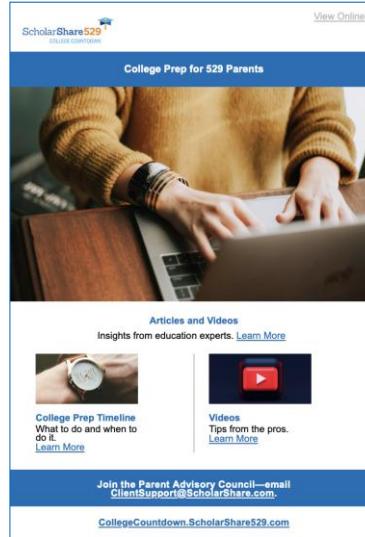
### January



### February



### March



### AO Engagement (Jan)



Content Drip, Inquirer and AO Onboarding emails series are not pictured but did run in Q1 2025.

# Q1 2025 Campaign

The Q1 2025 campaign ran from January 23 to March 31.

## Target

- Prospects

## Media

- Emails
- Display
- Secure Site Banner
- Home Page Module

The collage displays five different digital assets for the ScholarShare 529 campaign:

- Mobile Banner:** Shows a woman holding a baby with the text "Prepare for tomorrow today." and a "View Online" button.
- Desktop Banner:** Shows a woman holding a baby with the text "Save now. Thank yourself later." and a "Plan Distributor" button.
- Desktop Landing Page:** Shows a woman holding a baby with the text "Save now. Thank yourself later. Contribute to your ScholarShare 529 account today!" and a "4128312-0127" tracking number.
- Desktop Home Page Module:** Shows a woman holding a baby with the text "Make more out of every dollar you save for college with ScholarShare 529." and a "GET STARTED" button.
- Desktop Account Dashboard:** Shows a dashboard with the ScholarShare 529 logo, navigation links (Workplace 529, News, Español, Search, Log In), and a video player.

# 529 Day Campaign

## Results

- 1,985 new accounts opened during the promotional window with a qualifying initial deposit of \$50+, a 3.5% decrease versus the 2024 campaign
- Decline in results reflects continued economic instability related to trade wars and federal government spending cuts

**Timing:** May 20 - 31, 2025

## Targets

- Prospects
- Inquirers
- Existing AOs

## Media

- Emails
- Direct Mail
- Display
- Secure Site Banner
- Landing Page
- Home Page Module

The collage includes the following components:

- Main Landing Page:** A desktop view of the campaign landing page with a dark header, a main image of a family on the beach, and a call-to-action button "LEARN MORE".
- Mobile Banners:** Two mobile phone screens showing the campaign offer: "Get \$50 when you open a ScholarShare 529 account" and "Celebrate National 529 Day with a \$50 bonus".
- Social Media Posts:** Two Instagram-style posts with the same offer: "Get a \$50 new account bonus" and "Don't miss your \$50 bonus".
- Secure Site Banner:** A screenshot of the ScholarShare 529 website showing the "Celebrate 529 Day with a \$50 bonus" offer.
- Email Header:** A screenshot of an email header featuring the campaign offer.
- Print Materials:** A screenshot of a printed document or postcard with the offer details.

# ScholarShare 529 – Q1 2025 Social Media

In Q1 2025, ScholarShare 529's social media strategy focused on socially relevant and seasonal content, aligning with key moments throughout the quarter — including Financial Fitness Month in January, Love Month in February, and the transition into Spring. Paid media efforts in January and February supported messaging around financial preparedness during uncertain times. Metrics reflect mainly organic efforts but also include the small paid efforts in January/February.

## Total

**Followers - 75,653**

**Reach - 382,286**

**Impressions - 832,869**

**Trackable Mentions - 326**

**Trackable Website Visits - 7,472**



## Facebook (English)\* 2 months paid

- Followers - 59,097
- Reach - 334,531
- Impressions - 773,937
- Trackable Mentions - 136
- Trackable Website Visits - 7,198



## Facebook (Spanish)

- Followers - 12,085
- Reach - 231
- Impressions - 531
- Trackable Mentions - 33
- Trackable Website Visits - 27



## X

- Followers - 2,758
- Reach - 3,622
- Impressions - 4,520
- Trackable Mentions - 31
- Trackable Website Visits - N/A



## LinkedIn

- Followers - 408
- Impressions - 3,516
- Trackable Mentions - 65
- Trackable Website Visits - 59



## Instagram

- Followers - 1,106
- Reach - 43,902
- Impressions - 50,365
- Trackable Mentions - 61
- Trackable Website Visits - 188



## Threads\* Native Analytics not available

- Followers - 199

# ScholarShare 529 – Social Media Results

	<b>Q1-23</b>	<b>Q2-23</b>	<b>Q3-23</b>	<b>Q4-23</b>	<b>Q1-24</b> *No Paid	<b>Q2-24</b>	<b>Q3-24</b> *1 month Paid	<b>Q4-24</b> *1 month paid	<b>Q1-25</b> *2 months paid
<b>Followers</b>	73,787	73,788	73,662	73,573	76,339	76,230	76,718	75,871	75,653
<b>Reach</b>	1,690,911	1,126,138	704,457* Lack of paid social	1,400,666	112,489	641,176	277,092	1,031,210	382,286
<b>Impressions</b>	4,466,160	3,624,980	2,186,376 *Lack of paid social	2,653,325	118,006	3,236,187	1,094,296	3,165,750	832,869
<b>Trackable Mentions</b>	239	284	276	756	399	537	419	487	326
<b>Trackable Visits</b>	15,118	13,070	11,503	14,635	785	18,789	6,837	15,739	7,472

# ScholarShare 529 Social Media: Q1 Sentiment & Observations

## Positive Sentiment:

- In Q1 2025, ScholarShare 529's social media strategy continued to position the program as a trusted resource for California families by delivering seasonally relevant and educational content.
  - **Financial Fitness Month (January):** This content series performed especially well, resonating with families seeking to establish stronger financial habits at the start of the new year. The posts emphasized long-term planning and the benefits of early savings, reinforcing ScholarShare 529's value proposition.
  - **Spring Guides (March):** As the season shifted, the Spring Guides provided timely and approachable savings advice, generating strong engagement and positive feedback from the community.
  - **Content Formats:** In terms of format, carousel posts and reels consistently outperformed other content types, highlighting the audience's preference for easily digestible, informative, and visually dynamic storytelling.

## Observations:

- Across platforms, Q1 2025 saw a general decline in metrics when compared to the previous quarter. This shift can be partly attributed to broader external factors, including the current political and economic climate, which has seen users reducing social media activity or leaving certain platforms altogether.
- Additionally, it's important to note that Q4 2024 was supported by a \$10K paid media investment, whereas Q1 2025 operated with a more limited \$2K ad spend. This reduction in budget highly contributed to the decrease in overall visibility and reach.
- Despite these headwinds, campaigns like Financial Fitness Month and Spring Guides demonstrated that strategically crafted, seasonally relevant content — particularly in carousel and video formats — continues to engage and resonate with ScholarShare 529's target audiences.

# Outreach Events Summary

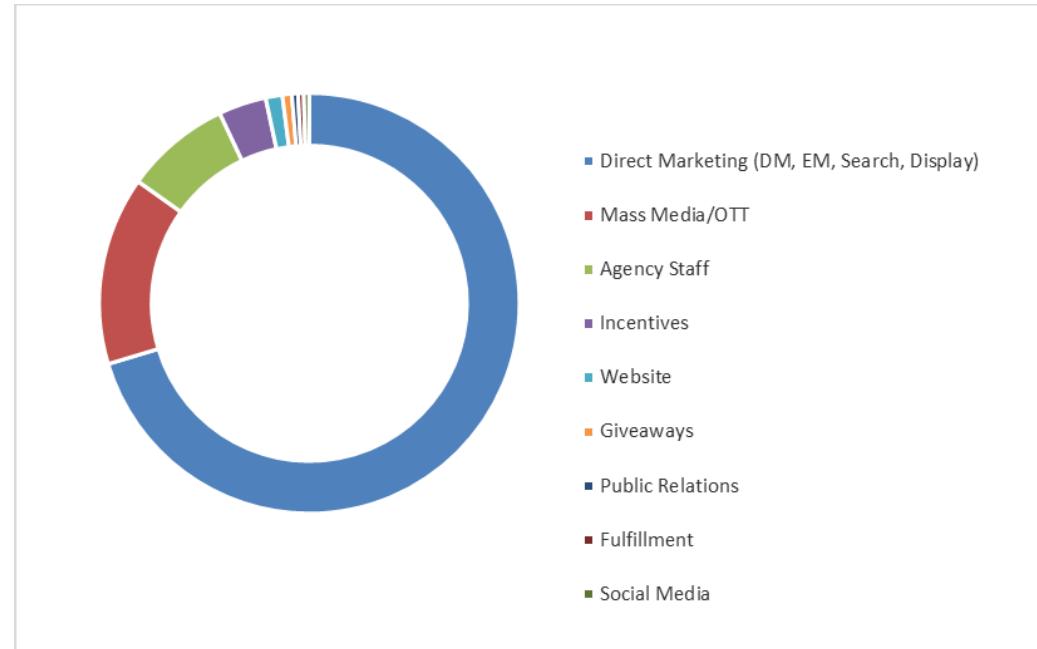
SIB Staff and the TIAA Field Consultant Team attended the following events in Q1 to promote ScholarShare 529 and CalKIDS to California families.

Number of Events	Estimated Number of Attendees	List of Select Events
106	22,282	Torrance Unified School District, Archie Williams Success Network, Los Angeles County Office of Education, Small School Districts Association, San Francisco Department of Children, Youth, and their Families, California School Personnel Commissioners Association, Dreamz Into Goals, San Diego Unified School District, Cal-SOAP Sacramento, Da Vinci Charter Schools, Cerritos College, San Bernardino County, Sony Pictures Entertainment, City of Fort Bragg, Graton Resort & Casino, Familias Unidas, Penske Media Corporation, CalGovHR, Women in Insurance and Finance, Sacramento City Unified School District, California State Lands Commission

# Appendix

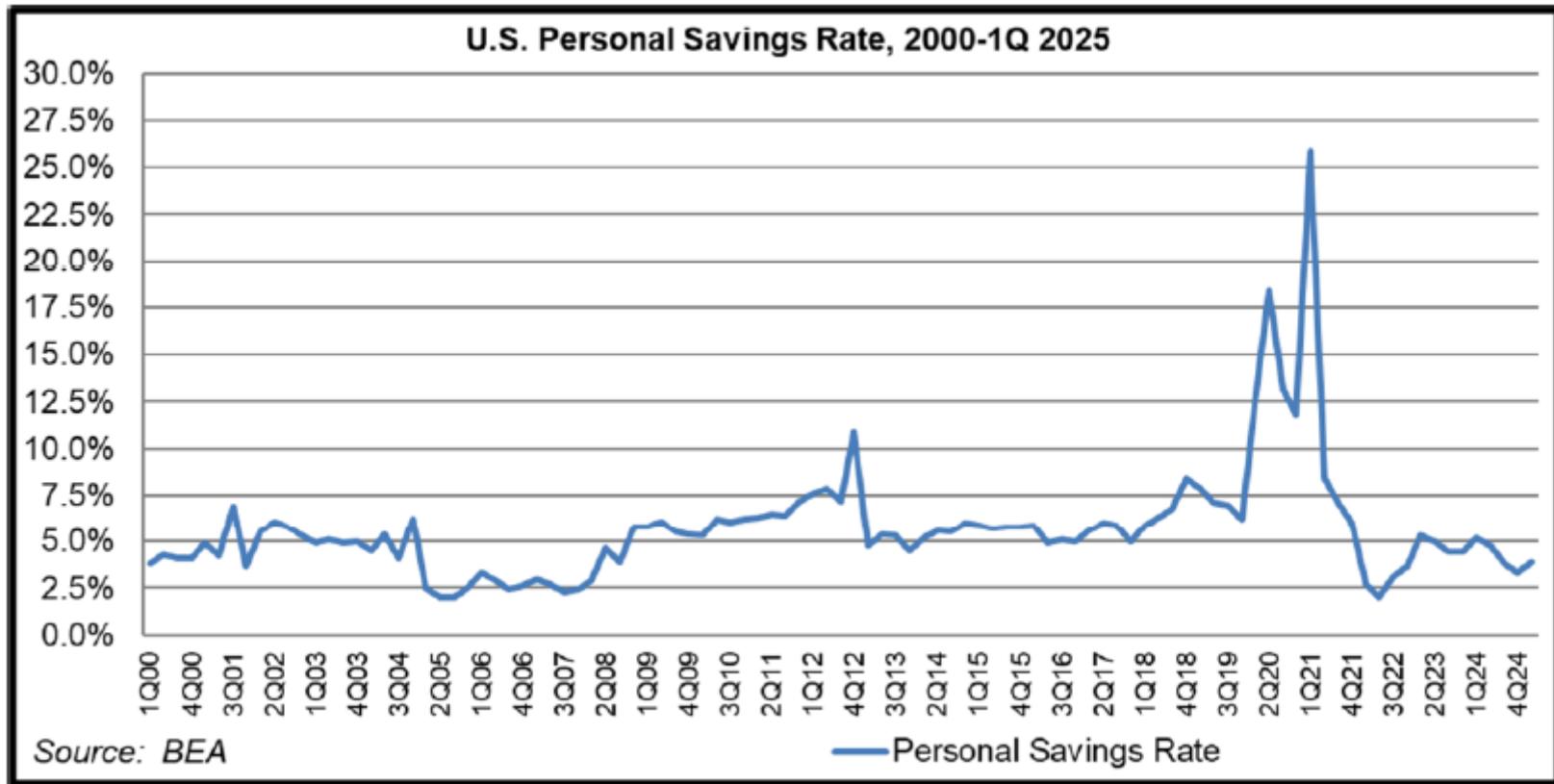
# 2025 Marketing Budget

Category	Spending thru 3/31/2025
Direct Marketing (DM, EM, Search, Display)	\$ 2,477,904
Mass Media/OTT	\$ 511,262
Agency Staff	\$ 286,723
Incentives	\$ 129,555
Website	\$ 45,154
Giveaways	\$ 25,467
Public Relations	\$ 16,721
Fulfillment	\$ 15,557
Social Media	\$ 14,608
<b>TOTAL</b>	<b>\$ 3,522,951</b>



# Personal Savings Rate

Current economic and world conditions continue to create hesitancy among prospects in our sales pipeline.



Source: ISS 529 Quarterly Update 1Q 2025

# ScholarShare 529 Social Media: Q1 Facebook Samples

 ScholarShare California's 529 College Savings Plan is in San Diego County, California. [...](#)  
Published by Instagram  
• January 3 •  
January is Financial Fitness Month! Ready to get in shape? A ScholarShare 529 account is a great tool to help your family build financial strength. With easy ways to ... [See more](#)



aving early can create strong future. Financial Fitness Month with ScholarShare 529. Start saving today at [ScholarShare529.com](http://ScholarShare529.com)!

 ScholarShare California's 529 College Savings Plan is in Los Angeles County, California. [...](#)  
Published by Instagram  
• March 25 at 6:31PM •  
Spring cleaning isn't just for your closet—it's also a great time to freshen up your family's college savings strategy! Swipe through to see our checklist on how you ca... [See more](#)



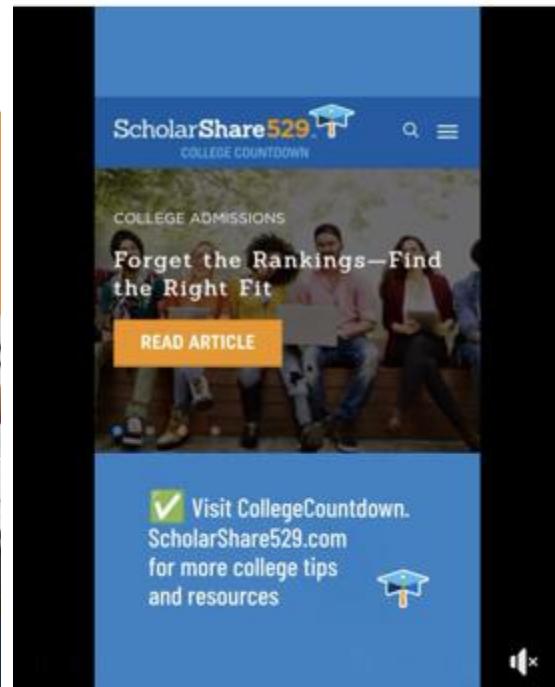
**Spring Cleaning Checklist: College**  
Declutter Your Budget  
Take a look at your family's financial plan and see where you can set aside funds for future education costs. A little organization can go a long way!

**Tidy Up Savings Goals**  
Review your family's college savings strategy and check if any adjustments are needed. Make sure your goals are realistic.

**Refresh Gifting Options**  
Did you know family and friends can contribute to a 529 account? It's a great way to help your loved ones while also saving for college.

**Sweep Through Your To-Do List**  
Make time to check out [scholarshare529.com](http://scholarshare529.com) and see how opening a 529 account or setting up recurring contributions can help your family's financial savings. [See more](#)

 ScholarShare California's 529 College Savings Plan is at Bay Area, California. [...](#)  
Published by Instagram  
• March 27 at 7:54PM •  
Spring is a busy season for high school juniors, high school seniors, and their parents. Stay on top of things with these important to-dos to get ready for college and ... [See more](#)

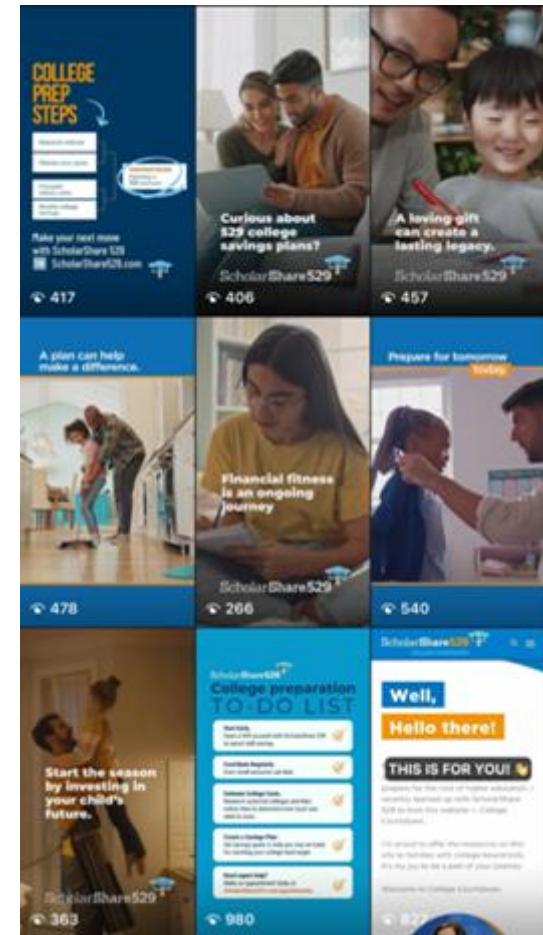


ScholarShare529 COLLEGE COUNTDOWN

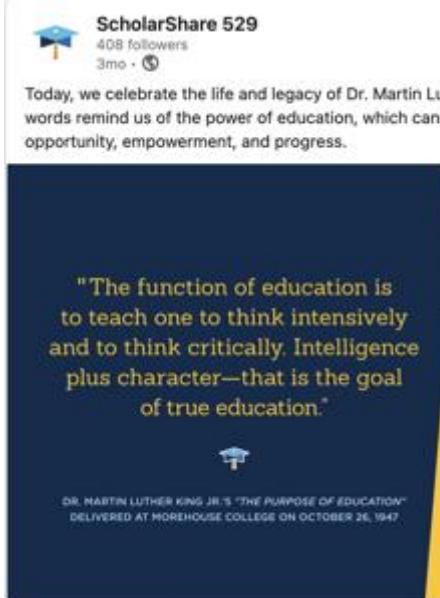
COLLEGE ADMISSIONS  
Forget the Rankings—Find the Right Fit  
[READ ARTICLE](#)

Visit [CollegeCountdown.ScholarShare529.com](http://CollegeCountdown.ScholarShare529.com) for more college tips and resources

# ScholarShare 529 Social Media: Q1 Instagram Samples



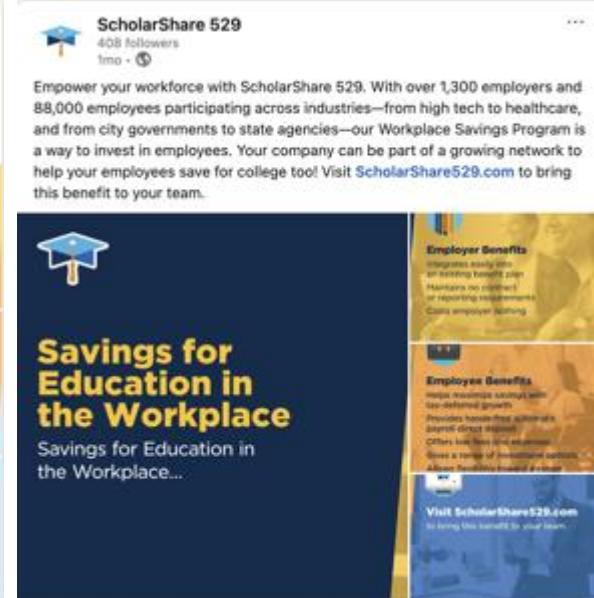
# ScholarShare 529 Social Media: Q1 LinkedIn Samples



**ScholarShare 529**  
408 followers  
3mo · 

Today, we celebrate the life and legacy of Dr. Martin Luther King Jr., whose words remind us of the power of education, which can be the foundation for opportunity, empowerment, and progress.

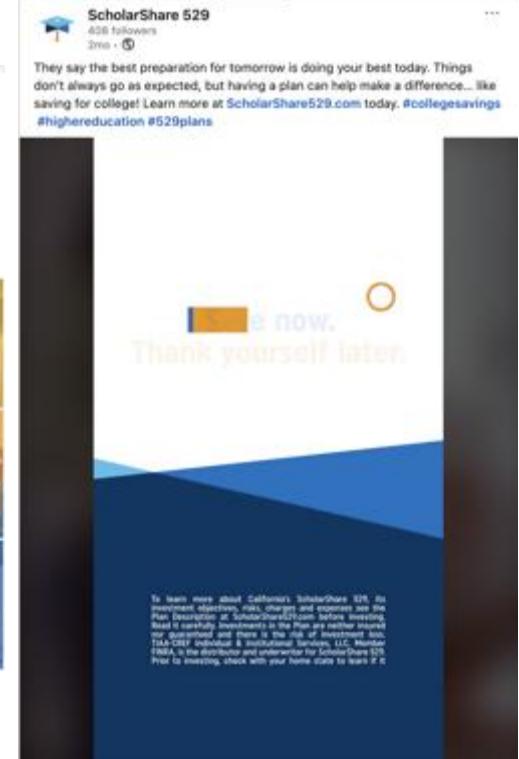
**"The function of education is to teach one to think intensively and to think critically. Intelligence plus character—that is the goal of true education."**  
DR. MARTIN LUTHER KING JR.'S "THE PURPOSE OF EDUCATION"  
DELIVERED AT MOREHOUSE COLLEGE ON OCTOBER 26, 1947



**ScholarShare 529**  
408 followers  
1mo · 

Empower your workforce with ScholarShare 529. With over 1,300 employers and 88,000 employees participating across industries—from high tech to healthcare, and from city governments to state agencies—our Workplace Savings Program is a way to invest in employees. Your company can be part of a growing network to help your employees save for college too! Visit [ScholarShare529.com](http://ScholarShare529.com) to bring this benefit to your team.

**Savings for Education in the Workplace**  
Savings for Education in the Workplace...



**ScholarShare 529**  
408 followers  
2mo · 

They say the best preparation for tomorrow is doing your best today. Things don't always go as expected, but having a plan can help make a difference...like saving for college! Learn more at [ScholarShare529.com](http://ScholarShare529.com) today. #collegesavings #highereducation #529plans

**Take now. Thank yourself later.**

To learn more about California's ScholarShare 529, its investment objectives, risks, charges and expenses see the Plan Document at [www.scholarshare529.com](http://www.scholarshare529.com). Read it carefully. Investments in the Plan are neither insured nor guaranteed by the state of California, TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, is the distributor and underwriter for ScholarShare 529. Prior to investing, check with your home state to learn if it

# ScholarShare 529 Social Media: Q1 X and Threads Samples

**ScholarShare 529** @ScholarShare529 · Mar 20 Promote ...

Just like flowers take time to bloom, college savings can take time to potentially grow. Join our live webinar on March 26th from 11:00 am-12:00 pm PDT to explore how a 529 plan can fit into the picture. Register today for free at [ScholarShare529.com/events](http://ScholarShare529.com/events)!



**Planning early for college can help their future bloom!**

Let ScholarShare 529 guide you.

Register today for free at [ScholarShare529.com/events](http://ScholarShare529.com/events)!

**ScholarShare 529** @ScholarShare529 · Jan 20 Promote ...

Today, we celebrate the life and legacy of Dr. Martin Luther King Jr., whose words remind us of the power of education, which can be the foundation for opportunity, empowerment, and progress.

**"The function of education is to teach one to think intensively and to think critically. Intelligence plus character—that is the goal of true education."**  
DR. MARTIN LUTHER KING JR. S. THE PURPOSE OF EDUCATION

**Martin Luther King Jr. Day** reminds us of the power of education to inspire change and create opportunities for a brighter future.

Today, ScholarShare 529 continues to support Dr. King's vision by providing families with a solution that can help plan

This MLK Day, take a moment to reflect on the importance of education in shaping the next generation of leaders.

Whether you're just starting to think about saving for your child's future or looking for ways to enhance your current plan, ScholarShare 529 is here to provide support.

**ScholarShare 529** @ScholarShare529 · Jan 23 Promote ...

Ready to crush the Mid-Month Financial Fitness Challenge? Take these steps now to invest in your child's future. Let's automate, plan, and celebrate every milestone together. Head to [ScholarShare529.com](http://ScholarShare529.com) and start your journey today!

**Challenge #1: Automate Contributions**  
Set up automatic monthly contributions to your ScholarShare 529 account this week. A little bit a month can add up over time!

**Challenge #2: Review Your College Savings Goals**  
Take 15-30 minutes this week to review your family's financial goals for 2024. Are you on track with your child's education savings?

**Challenge #3: Invite Family and Friends to Gift**  
Send a ScholarShare 529 gifting link to friends and family—encourage them to support your child's future for birthdays, holidays, or just because!

**Challenge #4: Share Your Progress**  
Post about your Financial Fitness Month journey such as what you've learned, how you have started, or what action steps you're taking... and tag us!

# ScholarShare 529 – Q1 Mentions & Shares

Most active in supporting ScholarShare 529 in Q1 (based on mentions, shares, reposts):

- California State Treasurer's Office and California State Treasurer, Fiona Ma
- Advocates and account holders
- Non-profit and organizations
- College Countdown Contributors

 **CA State Treasurer** @CalTreasurer · Mar 24

Did You Know? Remaining funds in a @ScholarShare529 plan can be rolled into a Roth IRA account free of penalties and fees for your child due to new rules adopted in 2024. The sooner you start saving, the better. It's never too late to save for your child's future! @fionama



**Nurture their future...**  
by opening a ScholarShare 529 account.  
Visit ScholarShare529.com today!

 **Cassandra DiBenedetto** mentioned your company in an update · 1mo

More 25-35-year-olds live with their parents than at any time since the Great Depression. If you don't want your adult kids...

 More young adults now live with their parents than at any point since 1940

17 reactions · 4 comments

 **David Bernal** · 2nd  
Co-founder & CEO of YoorKids | Entrepreneur | Had \$0 in Child Savings | Cha...  
2mo · Edited

Long-term savings benefits far outweigh any small impact on financial aid.

This is a common myth that comes up with child savings in 529s. ...more

 **Cassandra DiBenedetto** · 2nd  
Executive Director of the ScholarShare Investment Board  
2mo · Edited

Stop spreading myths about 529 plans and financial aid!

#529plans owned by a parent are assessed at just 5.64% in the ...more

 **Financial aid friendly**  
youtube.com