



Q2 2025 Marketing Results

September 22, 2025

Executive Summary

- 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 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 – Q2 Achievements

	Goal	Strategy	Achievements
1	Gain New Accounts/AUM	<p>Strategically use technology and marketing resources to grow the plan.</p> <p>Marketing Performance Targets:</p> <ul style="list-style-type: none"> 6% growth in Total Accounts 4% growth in Contributions <2% of Total Accounts closed due to rollovers 	<p><u>YTD Results</u></p> <ul style="list-style-type: none"> New Accounts are down 10% versus YTD 2024 – Gap has been closing in recent months. New Accounts are 46% of Annual Target of 50,000. Total Accounts of 467,738 are up 7% over YTD 2024. Contributions are up 9% versus YTD 2024 Contributions. <p><u>Marketing Performance Metrics YTD:</u></p> <ul style="list-style-type: none"> Total Accounts Growth Goal = 6% (479,506), 98% YTD (467,738) Contributions Growth Goal: 4% (\$1,413 million), 50% YTD (\$704 million) % of Total Accounts closed due to rollovers Goal: <2%, 0.21% YTD
2	Increase Account Owner Diversity	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	Cross-sell younger CalKIDS claimants on ScholarShare	Engage CalKIDS claimants with content to spur ScholarShare account openings	No significant progress was made on this initiative in Q2, but time and resources will be dedicated to the effort in the second half of 2025.
4	Grow plan via Employers/RIAs	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	Support tenured account owners	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 complete site compliance review was completed in Q2. A virtual open house is planned for October.

ScholarShare 529 Business Results

Marketing Performance Targets

- Total Accounts Growth Goal = 6% (479,506), 98% YTD (467,738)
- Contributions Growth Goal: 4% (\$1,413 million), 50% YTD (\$704 million)
- % of Total Accounts closed due to rollovers Goal: <2%, 0.21% YTD

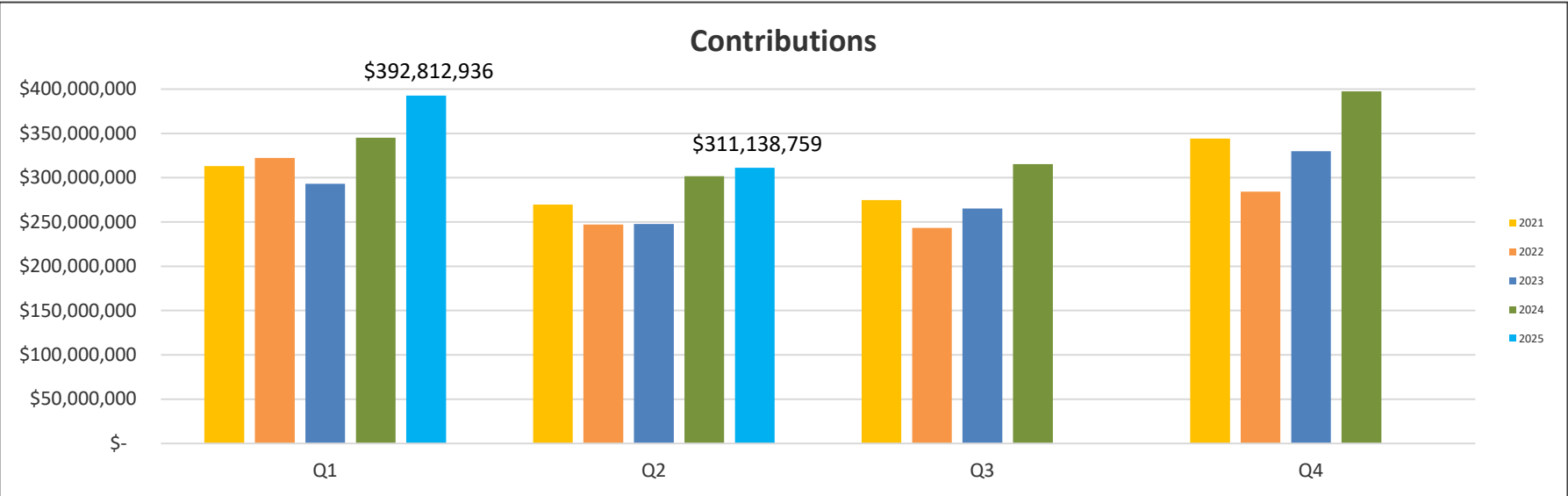
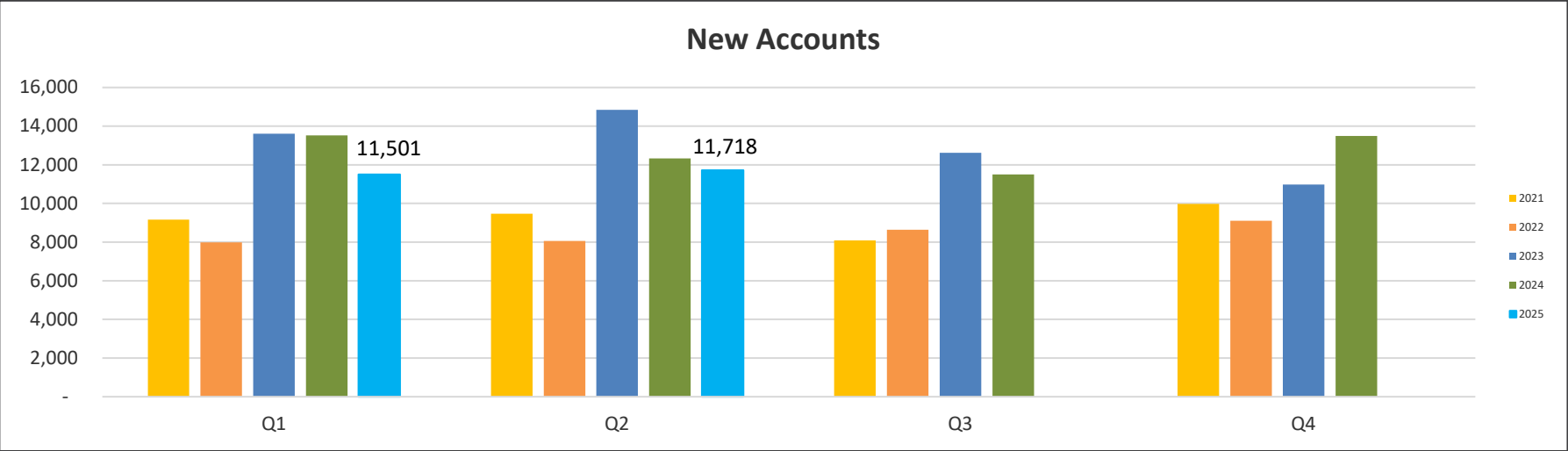
Accounts and Contributions	June 30, 2024	June 30, 2025	% Change
Total New Accounts Opened	25,849	23,219	-10.2%
Total New Contributions Collected ¹	\$657 million	\$704 million	8.9%
Growth Rate ²	ScholarShare 529	Industry	% Difference
Annual Asset Growth Rate excluding CalKIDS/Local CSAs	12.6%	13.2%	-0.5%
Annual Asset Growth Rate including CalKIDS/Local CSAs	13.9%	13.2%	0.8%
Rollovers	Year Ending June 30, 2024	Year Ending June 30, 2025	% Change
% of Plan Accounts Closed Due to Rollovers ³	0.38%	0.37%	-0.01%
Accounts and Assets	June 30, 2024	June 30, 2025	% Change
Total Open Accounts	439,039	467,738	6.5%
Assets excluding CalKIDS/Local CSAs	\$14.4 billion	\$16.3 billion	12.6%
Assets including CalKIDS/Local CSAs	\$15.6 billion	\$17.7 billion	13.9%
Market Share excluding CalKIDS/Local CSAs	4.8%	4.7%	-0.1%
Market Share including CalKIDS/Local CSAs	5.1%	5.2%	0.1%

¹ Excludes CalKIDS.

² ISS Market Intelligence – Q2 2025. "Industry" represents all Direct Sold Plans.

³ Excludes accounts closed from rollovers to Roth IRAs.

New Accounts and Contributions



New Accounts and Contributions – data tables

New Accounts

	Q1	Q2	Q3	Q4
2021	9,166	9,463	8,094	9,973
2022	7,981	8,055	8,636	9,098
2023	13,605	14,850	12,615	10,983
2024	13,514	12,335	11,496	13,493
2025	11,501	11,718		

Contributions

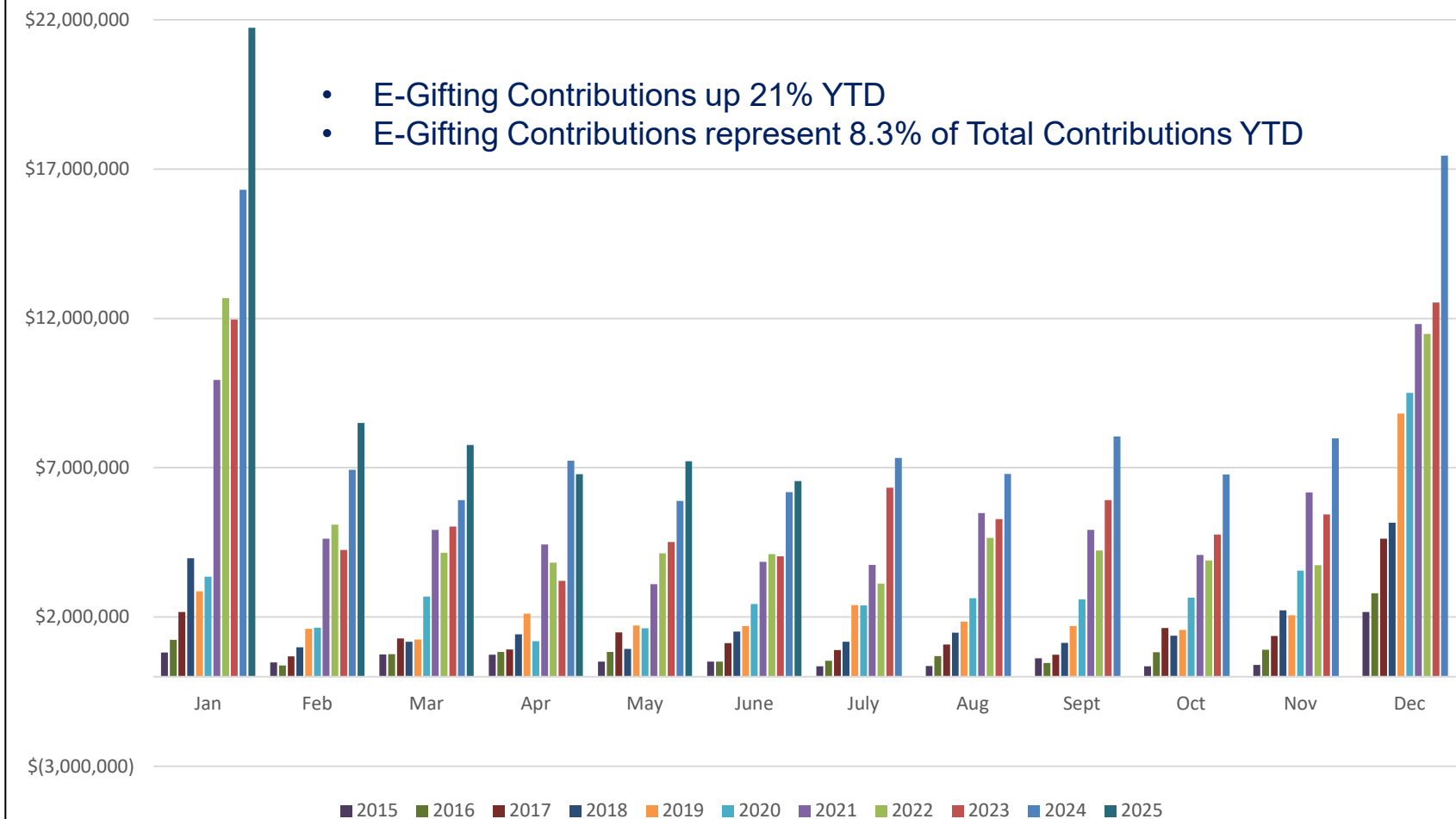
	Q1	Q2	Q3	Q4
2021	\$ 313,257,538	\$ 269,680,328	\$ 274,823,514	\$ 344,334,322
2022	\$ 322,237,018	\$ 247,099,857	\$ 243,342,358	\$ 284,211,334
2023	\$ 293,215,857	\$ 247,885,053	\$ 265,210,671	\$ 329,902,926
2024	\$ 345,144,555	\$ 301,549,772	315,209,187	\$ 397,541,348
2025	\$ 392,812,936	\$ 311,138,759		

E-Gifting Contributions are a meaningful portion of Total Contributions



E-Gifting Contributions

- E-Gifting Contributions up 21% YTD
- E-Gifting Contributions represent 8.3% of Total Contributions YTD



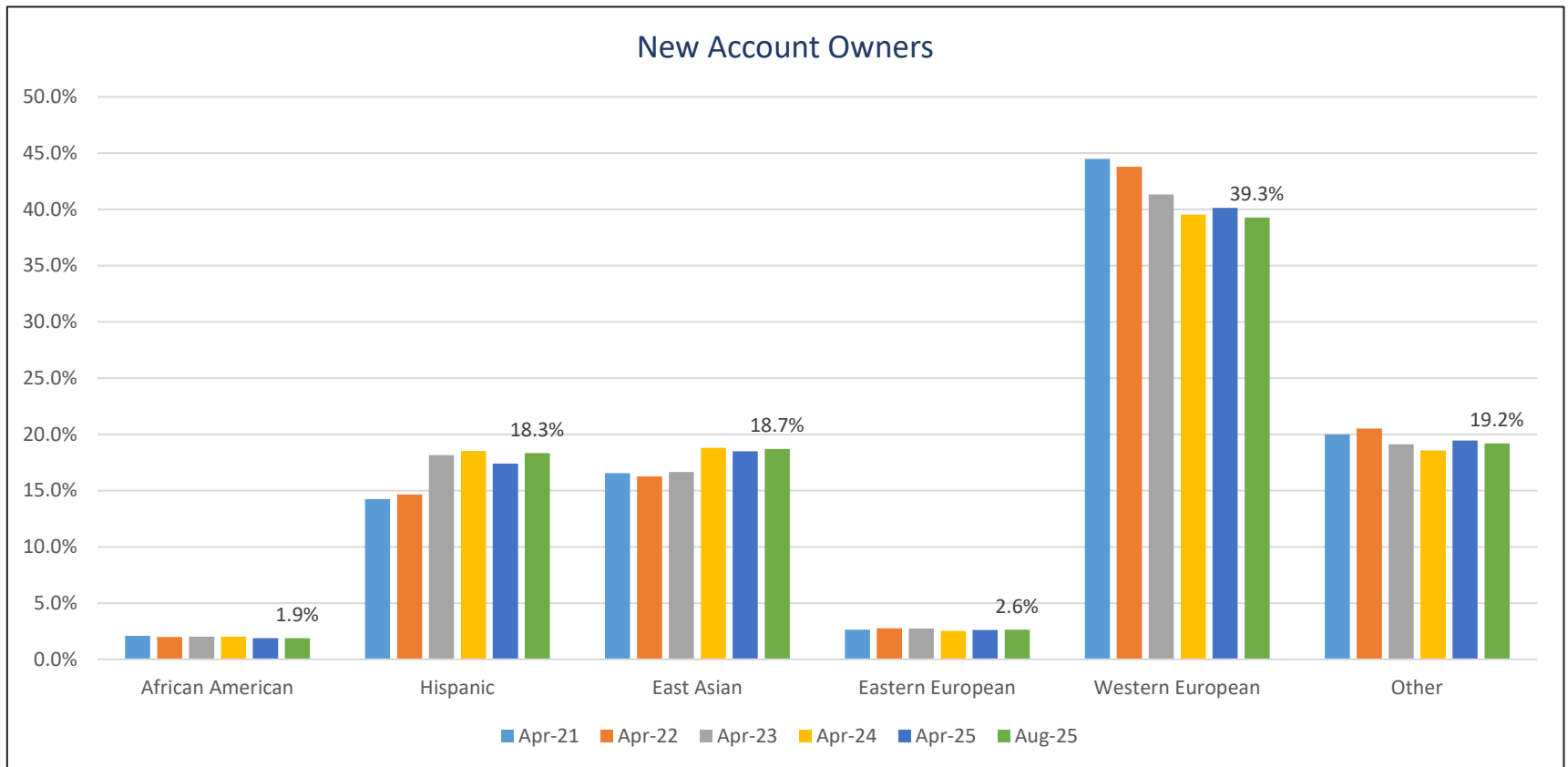
E-Gifting Contributions – data table



	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Grand Total	% Increase Over Prior Year
2025	\$21,738,599	\$8,502,433	\$7,759,028	\$6,778,008	\$7,211,196	\$6,553,286							\$58,542,551	
2024	\$16,310,865	\$6,933,994	\$5,911,471	\$7,237,481	\$5,889,106	\$6,181,648	\$7,323,360	\$6,787,369	\$8,048,703	\$6,770,490	\$7,977,539	\$17,453,779	\$102,825,808	40%
2023	\$11,958,192	\$4,242,632	\$5,032,078	\$3,211,601	\$4,509,801	\$4,032,073	\$6,329,064	\$5,281,655	\$5,916,976	\$4,763,136	\$5,431,249	\$12,534,867	\$73,243,322	13%
2022	\$12,683,029	\$5,092,992	\$4,147,732	\$3,820,642	\$4,131,351	\$4,102,549	\$3,114,912	\$4,651,344	\$4,222,821	\$3,889,210	\$3,734,629	\$11,482,110	\$65,073,320	-3%
2021	\$9,938,730	\$4,622,489	\$4,921,788	\$4,424,516	\$3,097,540	\$3,850,761	\$3,745,614	\$5,478,151	\$4,914,648	\$4,080,752	\$6,172,187	\$11,812,453	\$67,059,629	85%
2020	\$3,351,377	\$1,645,066	\$2,681,691	\$1,191,468	\$1,621,590	\$2,431,538	\$2,385,468	\$2,631,549	\$2,589,137	\$2,647,739	\$3,554,625	\$9,503,410	\$36,234,659	22%
2019	\$2,859,419	\$1,605,774	\$1,242,683	\$2,111,275	\$1,717,475	\$1,694,688	\$2,399,759	\$1,847,800	\$1,700,841	\$1,567,823	\$2,055,091	\$8,813,072	\$29,615,699	32%
2018	\$3,967,646	\$982,574	\$1,167,046	\$1,418,109	\$931,701	\$1,511,307	\$1,169,802	\$1,473,301	\$1,130,990	\$1,376,381	\$2,226,573	\$5,157,507	\$22,512,937	25%
2017	\$2,168,210	\$677,622	\$1,283,421	\$908,301	\$1,483,948	\$1,128,356	\$895,789	\$1,077,478	\$732,969	\$1,634,460	\$1,360,856	\$4,624,706	\$17,976,115	68%
2016	\$1,231,187	\$373,559	\$751,912	\$826,799	\$824,618	\$507,477	\$533,952	\$692,649	\$455,026	\$823,693	\$904,254	\$2,790,257	\$10,715,383	34%
2015	\$809,314	\$478,330	\$748,048	\$736,350	\$501,646	\$502,829	\$345,716	\$355,242	\$618,768	\$349,660	\$393,971	\$2,166,247	\$8,006,120	

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.



Household Ethnicity – New Account Owners

	African American	Hispanic	East Asian	Eastern European	Western European	Other
Apr-21	2.1%	14.25%	16.6%	2.6%	44.5%	20.0%
Apr-22	2.0%	14.66%	16.3%	2.8%	43.8%	20.5%
Apr-23	2.0%	18.2%	16.7%	2.7%	41.3%	19.1%
Apr-24	2.0%	18.5%	18.8%	2.5%	39.5%	18.6%
Apr-25	1.9%	17.4%	18.5%	2.6%	40.1%	19.4%
Aug-25	1.9%	18.3%	18.7%	2.6%	39.3%	19.2%

Employer Outreach Report – Q2 2025

New WPS Partners

City of Hawaiian Gardens

County of Monterey

City of Lancaster

City of Alhambra

City of Suisun City

2B Living Property Management

The Ministerial Association of California Counties

Point Park University

City of Azusa

Stir Foods, LLC

San Diego Computer Consulting

Redwood Eye Center

Brighter Beginnings

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

14

WPS Lead
Generating
Activities

13

New WPS
Partners

297

New Accounts

\$3.2M

AUM Support
through education

Educate

93*

Education activities
*9 of 93 conducted in
Spanish

259

One-on-One
consumer
consultations

News from The Field

Mono County Success Story: Steve Rose, former HR Director at Nevada County, saw firsthand the positive impact WPS made on employees' financial wellbeing after implementing the program in 2020. Now serving as HR Director for Mono County, Steve is eager to introduce WPS and looks forward to the upcoming Virtual Learning Series for benefits fair season to educate and support staff. As a major advocate, Steve highlights ScholarShare 529 at HR events and conferences, and has invited us to present at next year's California Counties HR Association Conference—helping expand access to employee financial wellness across the state.

Driving New Account Growth

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

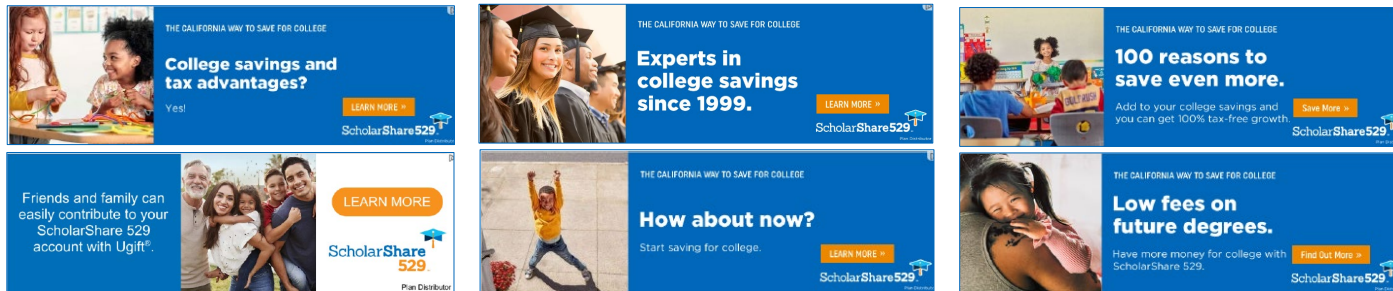
Tactical Results Year-over-Year (YoY)

Audience	2025 Q2 Engagement and Conversion Highlights*	2024 Q2 Engagement and Conversion Highlights*	YoY Q2 Comparison
Prospect	<ul style="list-style-type: none"> 529 Day Direct Mail/ Email (MD/EM) campaign generated 1,659 new prospect accounts and 1,094 recurring contribution (RC) sign-ups to date. 	<ul style="list-style-type: none"> 529 Day DM/EM campaign generated 1,499 new prospect accounts and 895 recurring contribution (RC) sign-ups to date. 	<ul style="list-style-type: none"> 529 Day DM/EM campaign saw YoY increases in new accounts and recurring contributions, 10% and 22%, respectively.
Inquirers	<ul style="list-style-type: none"> 29.9% email unique open rate 790 messaged individuals with a 7.7% conversion rate 	<ul style="list-style-type: none"> 27.8 % email unique open rate. 921 messaged individuals with a 4.9% conversion rate. 	<ul style="list-style-type: none"> Email engagement increased slightly YoY (7%). Conversion rate increased by 57% YoY.
New AO's	<ul style="list-style-type: none"> 39.8% email open rate 0.7% account upsell rate with 303 new accounts and 48% RC sign-up 	<ul style="list-style-type: none"> 38.9% email open rate. 0.7% account upsell rate with 276 new accounts and 48% RC sign-up. 	<ul style="list-style-type: none"> Email engagement remained consistent YoY. Account upsell rate and RC sign-ups remained consistent YoY, while new accounts saw a slight increase (9%).
Account Owners	<ul style="list-style-type: none"> 529 Day campaign had a 60-day contribution rate of 67.0% and average contribution dollars of \$818 to date. 	<ul style="list-style-type: none"> 529 Day campaign had a 60-day contribution rate of 60.6% and average contribution dollars of \$984 to date. 	<ul style="list-style-type: none"> 529 Day campaign saw a 10% increase in contribution rate and a 16% decrease in average contribution dollars to date.

*2025 and 2024 Q2 highlights use data as of 6/30.

Q2 Evergreen Creative

Banners



College Countdown April

ScholarShare 529[®] COLLEGE SAVINGS

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College Prep for 529 Parents

The Case for Higher Education

Is College Worth It?
Absolutely—here's why! [Learn More](#)

Student Debt: The Cost of Opportunity

Think College is Too Expensive? Think again! [Learn More](#)

Diversity—Access to Higher Education

Not College Material? You're more ready than you think! [Learn More](#)

Join the Parent Advisory Council—email ClientSupport@ScholarShare.com.

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May

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Get the clarity you need. [Learn More](#)

Is College Worth It? Here's what you gain. [Learn More](#)

Choosing a College? A bucket list can help—here's how. [Learn More](#)

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5 practical tips as college nears. [Learn More](#)

Inflation and College: 4 things you can do now. [Learn More](#)

Essential Websites: Must-read college and career sites. [Learn More](#)

Join the Parent Advisory Council—email ClientSupport@ScholarShare.com.

CollegeCountdown.ScholarShare529.com

AO Engagement (April)

ScholarShare 529[®] COLLEGE SAVINGS

[View online](#)

Grow your knowledge and savings

To celebrate Financial Literacy Month, we're highlighting how your contributions can grow over time with compound earnings. So, if you contribute monthly, an easy way to boost your savings is to set up an automatic annual increase that can help make a bigger difference in your savings.

See how savings stack up

Scenario	Initial Contribution	6% Annual Return	6% Annual Return
100/month	\$20,559	\$31,520	\$53,584
100/month	\$20,559	\$31,520	\$53,584
100/month	\$20,559	\$31,520	\$53,584

This chart assumes a \$5,000 lump sum investment, a \$100 monthly investment and 6% annual rate of return compounded annually. The calculations are for illustrative purposes only, and the results are not indicative of the performance of any investments. The calculations do not reflect any plan fees or charges that may apply. Each lump sum or regular contribution is made into a separate, separate account from the lump sum. Such automatic investment plans do not ensure a profit or protect against losses in declining markets. Account risks in the investment options is not guaranteed and will fluctuate with market conditions.

Compounding can boost your savings
Compounding growth is a powerful investing concept that involves earning returns on both your original investment and on returns you received previously. Investing early and contributing regularly allows your savings to compound and grow.

[ADD TO MY 529](#)

*CD Inquirer and AO Onboarding emails series are not pictured but did run in Q2 2025.

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

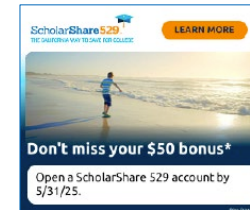
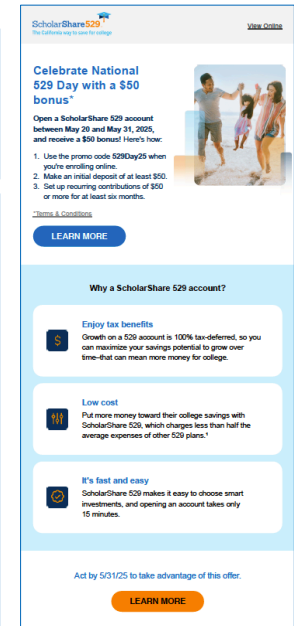
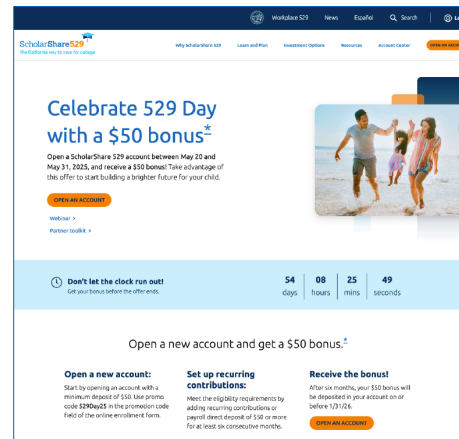
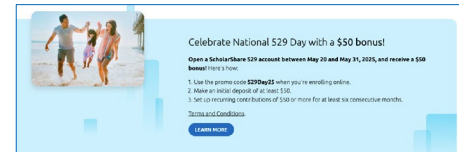
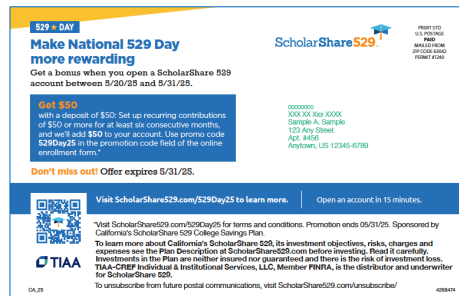
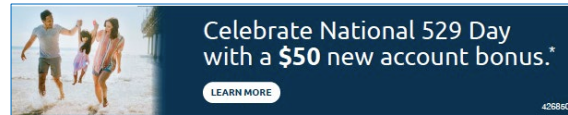
Timing: May 20 - 31, 2025

Targets

- Prospects
- Inquirers
- Existing AOs

Media

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



ScholarShare 529 – Q2 2025 Social Media

In Q2 2025, ScholarShare 529's social strategy aligned with key moments around financial empowerment and educational access. April focused on Financial Literacy Month, followed by a May series on the history of higher education, leading into 529 Day. June kicked off summer with a focus on long-term planning during seasonal transitions. While results reflect mostly organic engagement, they include limited paid support around 529 Day.

Total

Followers - 75,455

Reach - 431,646

Impressions - 860,127

Trackable Mentions - 333

Trackable Website Visits - 7,285



Facebook (English)* 1 month paid

- Followers - 58,900
- Reach - 385,857
- Impressions - 801,122
- Trackable Mentions - 139
- Trackable Website Visits - 6,944



Facebook (Spanish)

- Followers - 12,036
- Reach - 313
- Impressions - 540
- Trackable Mentions - 8
- Trackable Website Visits - 33



X

- Followers - 2,756
- Reach - 3,717
- Impressions - 4,663
- Trackable Mentions - 34
- Trackable Website Visits - N/A



LinkedIn

- Followers - 421
- Impressions - 3,581
- Trackable Mentions - 74
- Trackable Website Visits - 62



Instagram

- Followers - 1,139
- Reach - 41,759
- Impressions - 50,221
- Trackable Mentions - 58
- Trackable Website Visits - 246



Threads* Native Analytics not available

- Followers - 203

ScholarShare 529 – Social Media Benchmarks

	2023				2024				2025	
	Q1	Q2	Q3	Q4	Q1 *No Paid	Q2	Q3 *1 month Paid	Q4 *1 month paid	Q1 *2 months paid	Q2 *1 month paid
Followers	73,787	73,788	73,662	73,573	76,339	76,230	76,718	75,871	75,653	75,455
Reach	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	431,646
Impressions	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	860,127
Trackable Mentions	239	284	276	756	399	537	419	487	326	333
Trackable Visits	15,118	13,070	11,503	14,635	785	18,789	6,837	15,739	7,472	7,285

ScholarShare 529 – Q2 Mentions & Shares

Most active in supporting ScholarShare 529 in Q2 (based on mentions, shares, reposts):

- California State Treasurer's Office and California State Treasurer, Fiona Ma
- College savings advocates
- HR Community and companies that are part of Workplace Savings
- College Countdown Contributors



We had a wonderful day learning and growing with you all! A big thank you to our presenters and our board for their hard work in making today such a successful event. Shout out to **ScholarShare 529** and Julianna Gobin for their sponsorship of this event! Did you love the Delta Hotel as much as we did? We would love to hear from you and have you tag us in your photos.

#IESHRM #SHRM #HRCommunity



Beyond proud to be a part of the California 529 initiative through **ScholarShare 529** and CalKIDS. Supporting students on their pathway to higher education is imperative, and these organizations are making that goal possible. Eligible public school students in California can be awarded scholarships worth up to \$1,500!! Through our in-school learning content at **EVERFI**, we are able to connect eligible students with this opportunity, and ensure they claim their funds before graduation.



A new California resolution names May 29 as 529 Day, recognizing the role of college savings in expanding access to higher education. Treasurer **Fiona Ma** and **ScholarShare 529** are helping families plan for the future and close the wealth gap. More here: <https://bit.ly/STONews>



California State
Treasurer's Office
Bringing you the latest updates
from the Treasurer's Office.
NEWSROOM@TREASURER.CA.GOV



As the end of senior year approaches, parents may find themselves nearly exhausted from parenting a college-bound student.

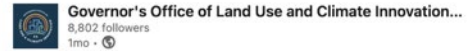
✓ Check out my newest **ScholarShare 529** College Countdown piece in which I discuss six steps parents can take to catch their breath and regain their footing as their children prepare for their next chapter:

1. Re-establish time for yourself
2. Reflect on what's next for you
3. Process your emotions
4. Celebrate the dual milestones
5. Reconnect with community
6. Be the example

7 Have you been through the experience of helping a child or loved one reach an important milestone? Please feel free to share about your experience and any tips you may have.

#collegecountdown #mentalhealthawarenessmonth #senioryear #parentshelpingparents #collegeplanning #selfcare

<https://lnkd.in/e5DYBeHf>



Today is **#529Day**! A day to discover **ScholarShare 529**. ScholarShare529 plans help families save money for their children or families educational expenses. 🎉 Take advantage and open a ScholarShare account before May 31, 2025, and you will receive a \$50 bonus! 🎉 Follow ScholarShare529 and the **California State Treasurer's Office** for more updates. 🌐 Visit their website for all the program information, or to open an account: <https://lnkd.in/gHCD4ApN>



Outreach Events Summary

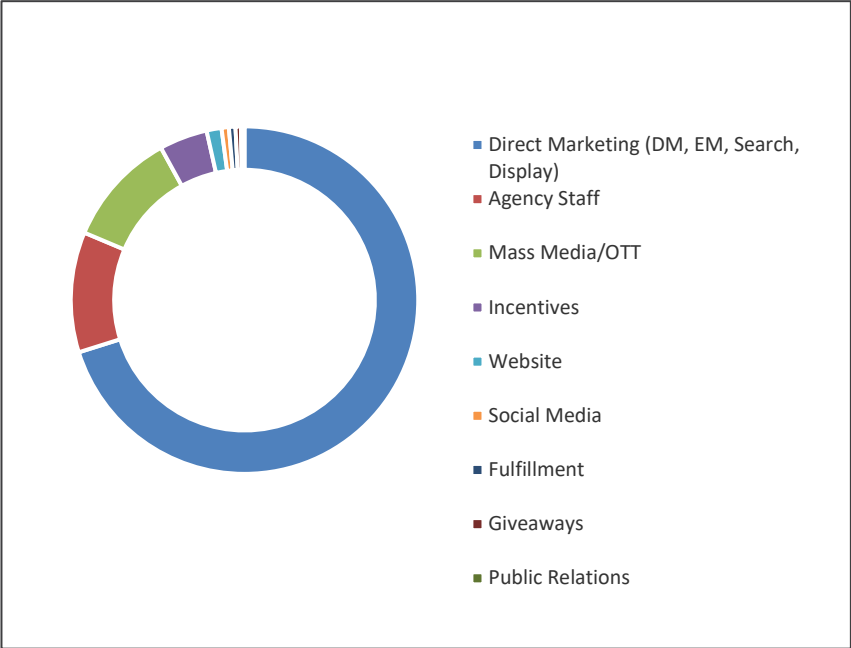
SIB Staff and the TIAA Education Consultant Team attended the following events in Q2 to promote ScholarShare 529 and CalKIDS to California families.

Number of Events	Estimated Number of Attendees	List of Select Events
180	42,880	Options for Learning, Kheir Clinic, Western Association of Student Employee Administrators, Cuyamaca College, Siskiyou County Office of Education, Sacred Path Indigenous Wellness Center, CalPERS, Love My Life Inc., Florin High School, National Association of Social Workers, Warren High School, Golden 1 Credit Union, California Foster Youth Education Task Force, Los Angeles Centers for Alcohol and Drug Abuse, Sony Pictures Entertainment, County of Ventura, Unison Therapy Services, Sac Sewer, Dominican University, Temple University Health System, Gavilan College, California Department of General Services, Merced County

Appendix

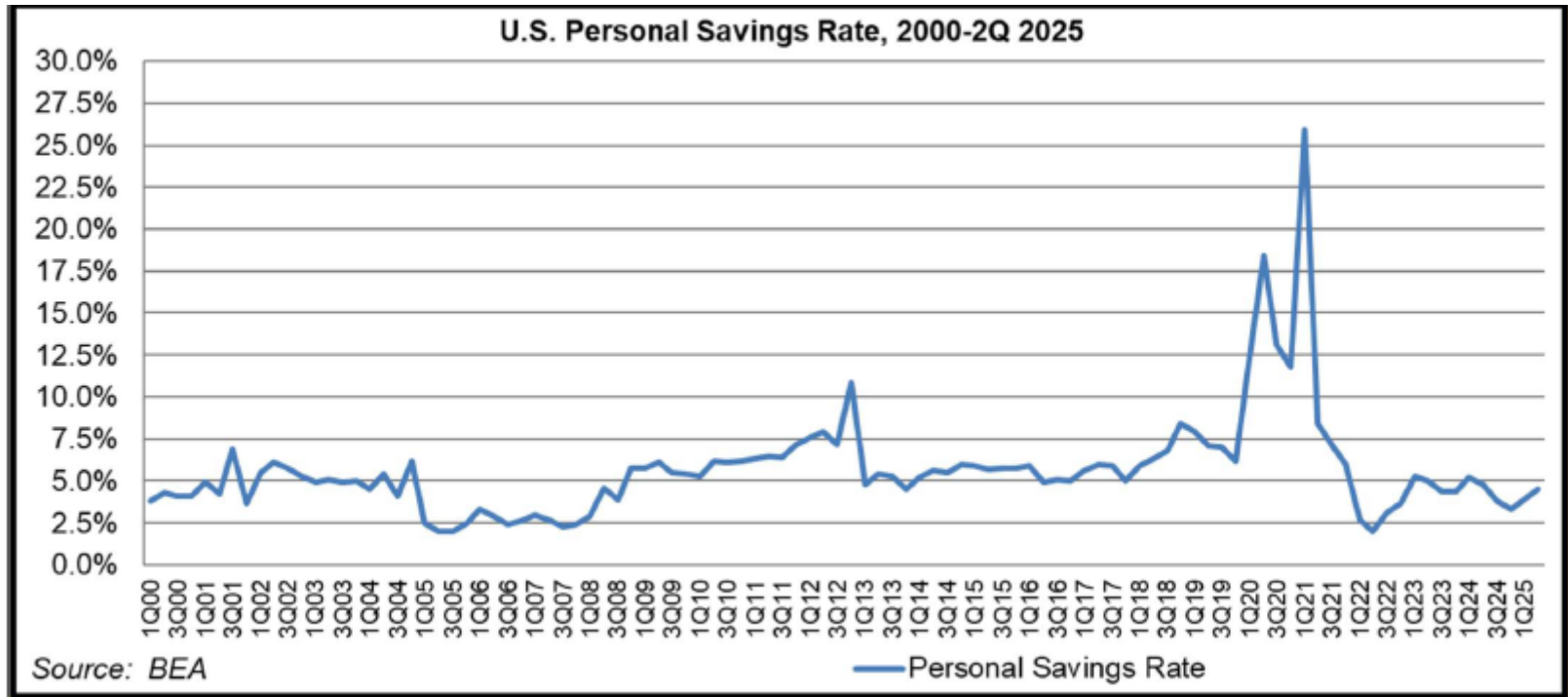
2025 Marketing Budget

Category	Spending thru 6/30/2025
Direct Marketing (DM, EM, Search, Display)	\$ 3,570,322
Agency Staff	\$ 570,108
Mass Media/OTT	\$ 543,144
Incentives	\$ 227,855
Website	\$ 70,597
Social Media	\$ 34,544
Fulfillment	\$ 31,007
Giveaways	\$ 25,467
Public Relations	\$ 16,721
TOTAL	\$ 5,089,765



Personal Savings Rate

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




Source: ISS 529 Quarterly Update 2Q 2025

ScholarShare 529 Social Media: Q2 Facebook Samples

ScholarShare California's 529 College Savings Plan is in Orange County, California. June 9 at 2:58 PM · 🌐

Graduation season is here! No matter what's next—moving up a grade or starting college—now is a great time to focus on financial goals. ✅ Plan for future education expe... See more



Set financial goals for future education.
Your education journey shouldn't stop here—what are your next goals? Write them down!

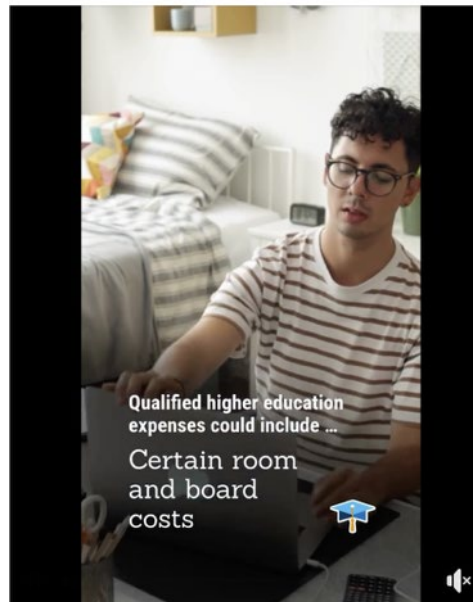
Budget for upcoming education expenses.
Tuition, books, supplies—start budgeting for what's next! Understanding how much

Learn about 529 college savings plans.
Did you know? A 529 plan can help you save for future education expenses. Check out ScholarShare529.com to learn more.

Now that graduation season is here...
Celebrate today, plan for tomorrow. Here's how!

ScholarShare California's 529 College Savings Plan is in California. Published by Instagram · April 8 · 🎵 Be Happy (Instrumental) · J.Wire · ⚙️

Did you know? A 529 plan isn't just for college tuition. 📖 Your funds can be used for room and board, books, laptops, and other supplies. Get the full breakdown and lea... See more



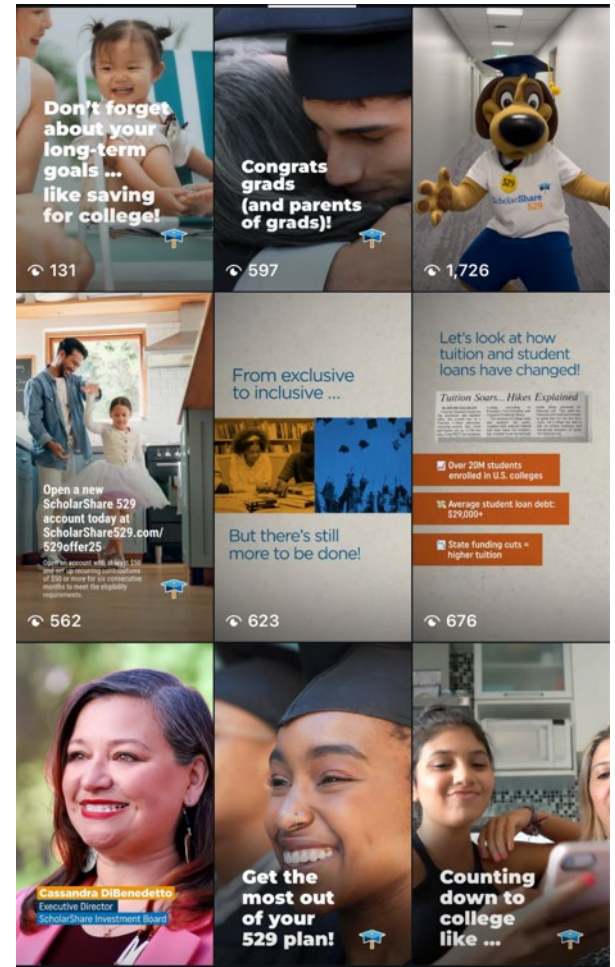
Qualified higher education expenses could include ...
Certain room and board costs

ScholarShare California's 529 College Savings Plan is with **calkidsprogram** and 2 others in California. Published by Instagram · May 29 · 🌐


Celebrating 529 Day like... 🐶🎓 California State Treasurer Fiona Ma and Diploma Dog are bringing the energy as we celebrate the power of saving for college with ScholarShare 529!



ScholarShare 529 Social Media: Q2 Instagram Samples



ScholarShare 529 Social Media: Q2 LinkedIn Samples

 **ScholarShare 529**
421 followers
3mo • 🌐

From budgeting and saving to planning for college, every step can count! Swipe through to learn how financial literacy and college savings go hand in hand, then visit ScholarShare529.com to learn more.





What is Financial Literacy Month?

April is Financial Literacy Month! It's a time to focus on making money moves and building financial confidence for the future. Ready to learn?

Swipe through to get started!


Literacy Month:
Financial Literacy Month is dedicated to helping individuals and families build strong money habits. From budgeting and saving to making informed financial choices, it's all about increasing financial knowledge and confidence.

Why does financial literacy matter?
Making good financial decisions starts early! Financial literacy helps families:

- Budget wisely.
- Save with a plan.
- Understand investments.

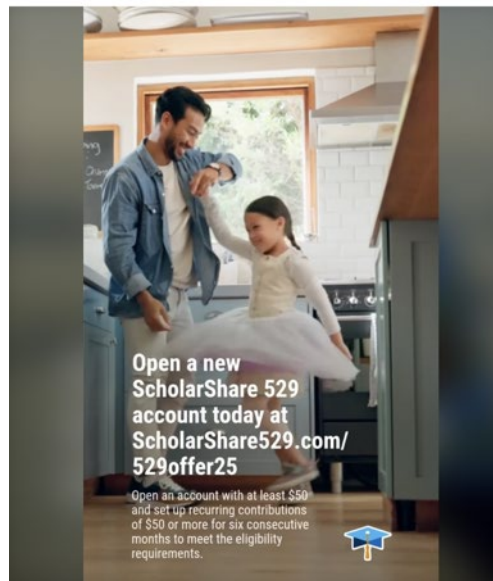
Savings tip #1:
College savings is an important part of financial literacy! A 529 plan can help families save for future education expenses, which also can give them more flexibility when planning for the future.

+1

 **ScholarShare 529**
421 followers
1mo • 🌐


There's no better time to start saving for college than today! From May 20-31, 2025, opening a ScholarShare 529 account with at least \$50 and setting up recurring contributions of \$50 or more for six months can earn you a \$50 bonus in your account. Visit https://lnkd.in/g_7kfPzn!


California State Treasurer's Office
Fiona Ma



Open a new ScholarShare 529 account today at ScholarShare529.com/529offer25

Open an account with at least \$50 and set up recurring contributions of \$50 or more for six consecutive months to meet the eligibility requirements.



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🎓 Today is National 529 College Savings Day in California! California State Treasurer Fiona Ma and our beloved Diploma Dog are celebrating the progress and impact of ScholarShare 529—helping families across the state save for higher education. Join us in recognizing the power of planning for the future!

California State Treasurer's Office
Fiona Ma



+2

ScholarShare 529 Social Media: Q2 X and Threads Samples



ScholarShare 529 @ScholarShare529 · Apr 21

Promote



College costs have risen over time, leading many students to take on loans. With tools like ScholarShare 529, families can have an option to save for future education, potentially reducing the need for student loans. See the full video on YT: youtu.be/B94IDEpafno.

Let's look at how tuition and student loans have changed!

Tuition Soars... Hikes Explained

By DIANE GALLIGAN
Coping financial stress for the institutions and students alike, the overall cost of a Pomona College education, including tuition, fees, room and board, are up 14.1% this year. From 1997 to 2020, the cost of a Pomona College education has risen by 141%.

✓ Over 20M students enrolled in U.S. colleges

✳ Average student loan debt: \$29,000+

✓ State funding cuts = higher tuition

0:16



ScholarShare 529 @ScholarShare529 · May 12

Promote



See how a 529 plan works, how it can help with education savings, and how it can fit into your family's financial plans. Join our free live webinar on 5/21 from 11am-12pm PDT. Register now at ScholarShare529.com/events!



A little planning can go a long way!

Learn how a 529 plan can help with future education costs.

Register now for our live webinar at ScholarShare529.com/events!



ScholarShare 529 @ScholarShare529 · Jun 23

Promote



Join our experts on June 25 at 11:00 AM PDT for a free webinar where we'll cover key topics like the cost of higher education, how ScholarShare 529 can support your savings goals, and maximizing your resources. Reserve your spot at ScholarShare529.com/events.



Ready to learn more about 529 plans?

Join our free live webinar on June 25th!

Reserve your spot at ScholarShare529.com/events.



ScholarShare 529 @ScholarShare529 · Apr 1

Promote



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