



**The Education Plan®**  
A little today goes a long way

# Give the Gift of Education With a Scholarship

With The Education Plan, a New Mexico 529 Education Savings Plan, your company can award scholarships to students with a 529 plan. Whether you're a corporation, partnership, trust or non-profit, start investing in your community today.

## Requirements

### Corporation

- Copy of Articles of Incorporation certified by Secretary of State or a government entity
- Tax ID Number
- Designate beneficiary at time of opening account

### Trust

- Copies of the Title and Signature Pages of the Trust Document
- Tax ID Number
- Designate beneficiary at time of opening account

### Partnership

- Copy of Partnership Papers
- Tax ID Number
- Designate beneficiary at time of opening account

### Non-Profit 501(c)(3)

- Copy of ruling of determination letter from IRS
- Tax ID Number
- Designate beneficiary at time of opening account
- Use account maintenance form to designate a beneficiary



**To learn more or to open an account on behalf of your organization, call 505.476.3860 today.**

\*Account owner may be required to designate student recipient upon opening an account.

For more information about The Education Plan, call 1.877.337.5268 or visit [theeducationplan.com](http://theeducationplan.com) to obtain a Plan Description and Participation Agreement, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing. Please Note: Before you invest, consider whether your or the beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in that state's qualified tuition program. You also should consult a financial, tax, or other advisor to learn more about how state-based benefits (or any limitations) would apply to your specific circumstances. You also may wish to contact directly your home state's 529 plan(s), or any other 529 plan, to learn more about those plan's features, benefits and limitations. Keep in mind that state-based benefits should be one of many appropriately weighted factors to be considered when making an investment decision.

The Education Plan is administered by The Education Trust Board of New Mexico. Ascensus College Savings Recordkeeping Services, LLC, the Program Manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services. The Education Plan's portfolios invest in: (i) mutual funds; (ii) exchange traded funds; and/or (iii) a funding agreement issued by New York Life. Investments in The Education Plan are not insured by the FDIC. Units of the portfolios are municipal securities and the value of units will vary with market conditions.

Investment returns will vary depending upon the performance of the portfolios you choose. You could lose all or a portion of your money by investing in The Education Plan depending on market conditions. Account owners assume all investment risks as well as responsibility for any federal and state tax consequences. Ugift is a registered service mark of Ascensus Broker Dealer Services, LLC. The Education Plan® and The Education Plan® Logo are registered trademarks of The Education Trust Board of New Mexico used under license. All other marks are the exclusive property of their respective owners.

**Not FDIC-Insured. No Bank, State or Federal Guarantee. May Lose Value.**