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

An online service from Ascensus

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

529 quickview®

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-administered 529 plans.

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

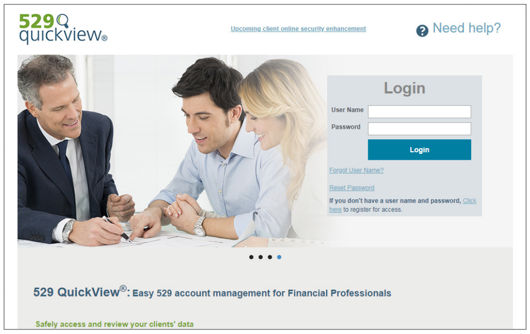
529quickview.com

It only takes a few minutes to get started

Step **1**

Go to www.529quickview.com

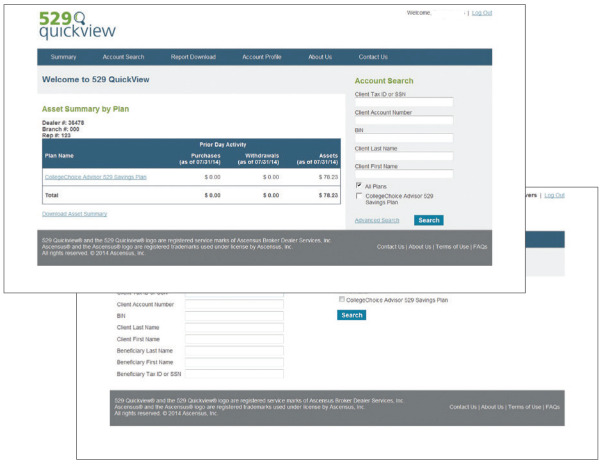
- Follow the 'click here' link under the login box (you only need to complete this step once)
- After you've filled in and submitted the online form, you'll be notified by email regarding your 529 QuickView registration
- When you register, you will be asked to supply information on your dealer, branch, and representative number (or CRD Number), firm access level, and a client account number(s). Once your registration has been approved, you'll receive access authorization by email



Step **2**

View client activity summaries

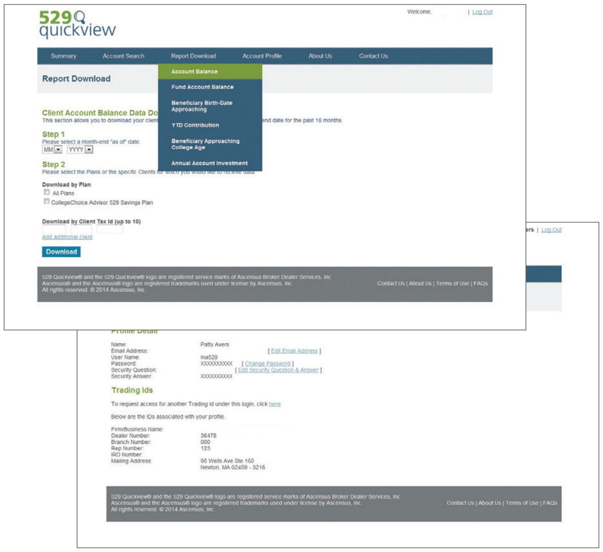
- Access your clients' 529 activity, including purchases, withdrawals, and assets
- Search for clients by plan, client or beneficiary name, tax identification number, Social Security number, or account number
- View the same screens as your clients at login



Step **3**

Access, download, and act

- View daily account balances, including assets by portfolio type, principal, and earnings
- Use the following downloadable reports to help manage your clients' goals and objectives:
    - Annual account investment
    - Year to date contribution
    - Client fund account balance
    - Approaching college age
    - Approaching beneficiary birthday
    - 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, and annual exchanges*
- 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 and Broker/Dealer.

Quick questions about **529 QuickView**

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

If you are offering an advisor plan, no client authorization is required. If you are offering a direct sold plan, your client must provide their account number and grant you authorization by completing a Limited Power of Attorney/Agent Authorization Form or Power of Attorney Form, available on the Plan's website or by calling the 529 QuickView help line at **1.888.823.4348**.

What is the safeguard for deciding who has access?

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

Can I download the client information to my computer?

Yes. You can download reports in CSV and HTML 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 and security validation questions (6-12 characters, letters, and numbers)
- Timeout of authentication sessions
- Strict registration requirements

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 6:00 p.m. Eastern Time.**

For questions related to client accounts or plans

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

Ascensus 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 solution, please contact us at **1.888.823.4348.**

529 quickview®

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Always have a plan

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