



FOR IMMEDIATE RELEASE

Contact:

Jamie H. Dushin, 406-449-9169

jdushin@montana.edu

Achieve Montana Ranked Top 10 Performing 529 College Savings Plan
Montana Children Benefit from One of The Best College Savings Accounts in the Nation

Helena, Mont., June 30, 2022 – Achieve Montana, Montana’s 529 plan designed to help individuals and families save for college in a tax-advantaged way, has recently been ranked in the top 10 performing 529 college savings plans in the nation by SavingForCollege.com. SavingForCollege.com analyzes investment performance figures for thousands of 529 portfolios.

“We are honored and thrilled to be named one of the best college savings plans in the nation,” said Clayton Christian, Commissioner of Higher Education. “Paying for your kid’s college doesn’t have to be a dream; it can be a reality. And Montana families have one of the best solutions to help pay for their children’s future college education right at their fingertips.”

Achieve Montana’s college savings plan can be used for tuition, fees, books, and more, at eligible two- and four-year schools, trade and technical schools, and graduate schools across the United States and abroad. Accounts can also be used to pay for qualified apprenticeship program expenses, certain education loan repayments (\$10,000 lifetime limit), and K-12 education tuition (up to \$10,000 per year).

Higher education is the key to helping children move toward their future dreams and goals. That’s why it is so important for Montana families to start a plan now and save for tomorrow’s college costs. Parents can open an Achieve Montana 529 college savings account for as little as \$25 or \$15 with payroll deduction. They can choose from a variety of investment options that best suit their family’s needs and goals and get tax advantages that include a state income tax deduction for contributions.

Signing up is easy, just visit achievemontana.com today.

###

For more information about Achieve Montana, download an Enrollment Kit at achievemontana.com or call 877.486.9271. The Enrollment Kit includes a Program Description that discusses investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing.

If you are not a Montana taxpayer, consider before investing whether your or the beneficiary’s home state offers any state tax or other benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in that state’s qualified tuition program.

Achieve Montana is sponsored by the State of Montana and administered by the Montana Board of Regents of Higher Education, as sole trustee of the Montana Family Education Savings Trust. Ascensus College Savings Recordkeeping Services, LLC provides program management, recordkeeping and administrative support services for Achieve Montana. Blackrock Fund Advisors, Dimensional Fund Advisors LP, Charles Schwab Investment Management, Inc., New York Life Insurance Company and the Vanguard Group, Inc. each provide investment management services for the underlying investments comprising Achieve Montana’s portfolios. Except to the extent of the New York Life Insurance Company guarantee that is available for the Capital Preservation Portfolio and

ACHIEVEMONTANA.COM · THEIR TOMORROW STARTS TODAY

certain of the Year of Enrollment Portfolios, investment returns are not guaranteed, and you could lose money by investing in Achieve Montana.



Except to the extent of the New York Life Insurance Company guarantee that is available for the Capital Preservation Portfolio and certain Year of Enrollment Portfolios, investment returns are not guaranteed, and you could lose money by investing in Achieve Montana.