Future Scholar 😂

529 College Savings Plan

1	South Carolina	\$216,892	
16	SHU \$283,040/Presbyterian	\$242,036	
8	North Carolina	\$225,800	244
9	Michigan State	\$240,208	ŊÃ
5	Oklahoma	\$190,224	
12	FGCU	\$171,104	
4	Indiana	\$230,368	
13	Fairfield	\$307,760	
6	Nebraska	\$185,184	
11	Texas A&M	\$242,944	
3	Oregon State	\$217,500	
14	Eastern Washington	\$181,748	
7	Ole Miss	\$186,080	
10	Marquette	\$273,720	
2	Notre Dame	\$333,084	
15	Kent State	\$165,152	
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1	Texas	\$250,688	
16	Drexel	\$325,652	
8	Alabama	\$218,728	ŠK.
9	Florida State	\$156,328	
5	Utah	\$153,976	T.
12	South Dakota State	\$113,016	-
4	Gonzaga	\$296,996	
13	UC Irvine	\$279,312	
6	Tennessee	\$208,672	
11	Green Bay	\$120,188	
3	NC State	\$197,904	
14	Chattanooga	\$138,440	
7	lowa State	\$165,560	
10	Maryland	\$238,744	
2	Stanford	\$351,332	
15	Norfolk State	\$156,016	





FOUR-YEAR COLLEGE COSTS



	1	lowa	\$202,236
	16	Holy Cross \$322,000/UT Martin	\$118,512
	8	West Virginia	\$181,424
	9	Princeton	\$336,160
	5	Colorado	\$252,788
	12	Drake	\$268,320
	4	Kansas State	\$184,640
	13	Portland	\$298,800
	6	Louisville	\$200,208
	11	Middle Tenn.	\$189,424
	3	LSU	\$207,580
	14	Rice	\$313,112
	7	Creighton	\$255,160
	10	UNLV	\$173,840
	2	UCLA	\$275,232
	15	California Baptist	\$223,592
	1	Southern California	\$361,812
	16	A&M-Corpus Christi	\$154,240
	8	Kansas	\$184,640
	9	Michigan	\$302,504
	5	Baylor	\$297,076
	12	Vanderbilt \$358,360/Columbia	\$358,348
	4	Virginia Tech	\$233,872
	13	Marshall	\$146,584
	6	Syracuse	\$340,588
	11	Auburn \$226,824/Arizona	\$242,380
	3	UConn	\$249,400
	14	Jackson State	\$136,032
	7	Duke	\$348,288
	10	Richmond	\$325,280
11)	2	Ohio State	\$226,948
	15	Maine	\$205,248

BECOME A STUDENT OF THE GAME

Why 529?

Qualified expenses

Tuition up to \$10,000 per year, per student¹ for kindergarten through 12th grade

For postsecondary education

- · Tuition and fees
- · Books, supplies and equipment required for enrollment or attendance
- Room and board: On- or off-campus for students who are at least half-time
- Computer, peripheral equipment, software and internet access if used primarily by the beneficiary
- Special needs services as required by beneficiaries in connection with enrollment or attendance
- Fees, books, supplies and equipment required for participation in a registered apprenticeship program²
- Repayment of principal/interest on any qualified education loan up to a \$10,000 lifetime limit for the designated beneficiary and/or sibling of the beneficiary

Eligible institutions

- · In-state and out-of-state colleges
- · Public and private schools
- · Vocational schools
- · Technical and trade schools
- Certain international educational institutions
- Any public, private or religious elementary or secondary school (K–12)
- Registered apprenticeship program²

Added features

- Income, gift and estate tax advantages, including an exclusive five-year accelerated gifting feature
- Rollover to a Roth IRA for the designated beneficiary subject to certain conditions³

Why Future Scholar 529?

- Rated 4.5 caps by Saving For College⁴
- One of the lowest cost advisor-sold plans⁵
- High contribution limit of \$540,000 per account
- Choice of investment vehicles including age-based, asset allocation and customized portfolios
- Diverse investment lineup from multiple, well-known asset managers

To find out more, call 800.426.3750 or visit columbiathreadneedle.com.



¹ Withdrawals from 529 plans for elementary or secondary education tuition expenses are federally tax-free based upon recent federal tax legislation. State tax consequences will vary depending on state law and may include recapture of any tax deductions received from the original state, imposition of income tax and penalties. Investors should consult with a tax or legal advisor in this regard. ²Registered and certified with the Department of Labor. ³ Section 126 of the SECURE 2.0 Act. ⁴ 4.5 caps is indicative of the Non-Resident rating as of May 2023. Our Future Scholar 529 Plan Resident (South Carolina) rating is 5 caps. The 5-Cap Rating, created by Saving For College, provides an assessment of the attractiveness of each 529 plan. The following categories are evaluated ahead of assigning a rating: performance, costs, features, reliability and resident upgrade. Based on their findings, the overall rating will be between 0 and 5 caps, with 5 being the highest. Visit savingforcollege.com to learn more. ⁵ Source: ISS Market Intelligence as of 12/31/23.

Please consider the investment objectives, risks, charges and expenses carefully before investing. Contact your financial advisor or visit www.columbiathreadneedleus.com/investor/ for an Advisor Plan program description or visit futurescholar.com for a Direct Plan program description, which contains this and other important information about the Future Scholar 529 College Savings Plan. Read it carefully before investing. You should also consider, before investing, whether the investor's or designated 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 such state's qualified tuition program.

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Not FDIC or NCUA Insured | No Financial Institution Guarantee | May Lose Value

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