



# Seeing the plan in action



Private College 529 Plan



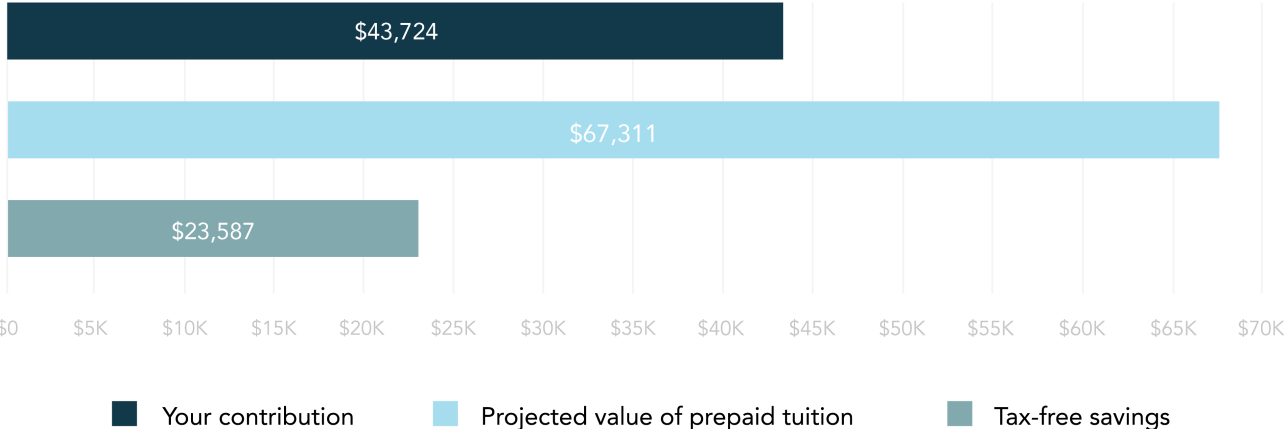
### One-time saver

Bob opens a Private College 529 account for his 8-year-old son and makes a one-time contribution of \$43,724\* in May of 2022.

\*Average tuition and fees for all member colleges is \$43,724.

### Assumptions

- College enrollment: 2032
- Initial contribution: \$43,724 in 2022
- Monthly contribution: \$0
- Tuition inflation (est.) 4%/year



# Saving Scenario 1

*Family saves more than \$23,500 on one full year of tuition.*

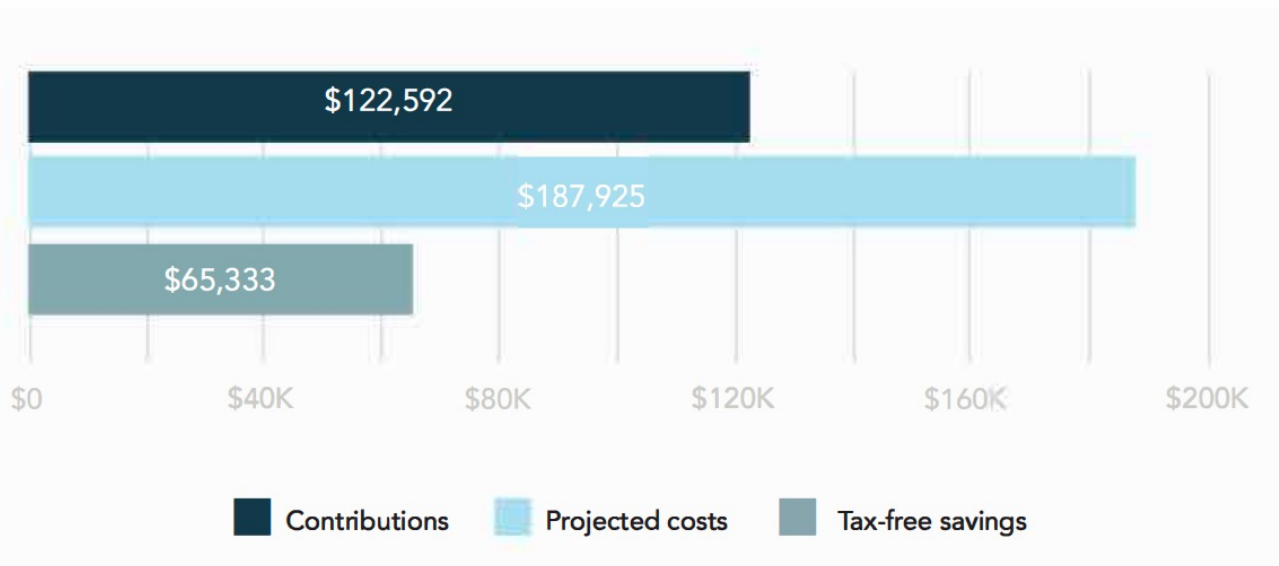
## Save early and often

Bob and Gina just welcomed a new baby. As alumni of private colleges, they hope to save two years' worth of tuition (based on average tuition and fees\*) for all colleges and universities in the plan by the time their child is 18.

### Assumptions

College enrollment: 2040  
Initial contribution: \$2,500 in 2022  
Monthly contribution: \$548  
Tuition inflation (est.): 4% per year

\*Average tuition and fees for all member colleges is \$43,724.



# Saving Scenario 2

*Family saves more than \$65,000 on two years of tuition.*

## Open not one but two plans

In this scenario, Bob and Gina want to diversify, dividing college savings between a 529 prepaid plan and a 529 savings plan.

### Assumptions

College enrollment: 2040

### Private College 529 plan

Initial contribution: \$2,500 in 2022

Monthly contribution: \$400

Tuition inflation (est): 4% per year

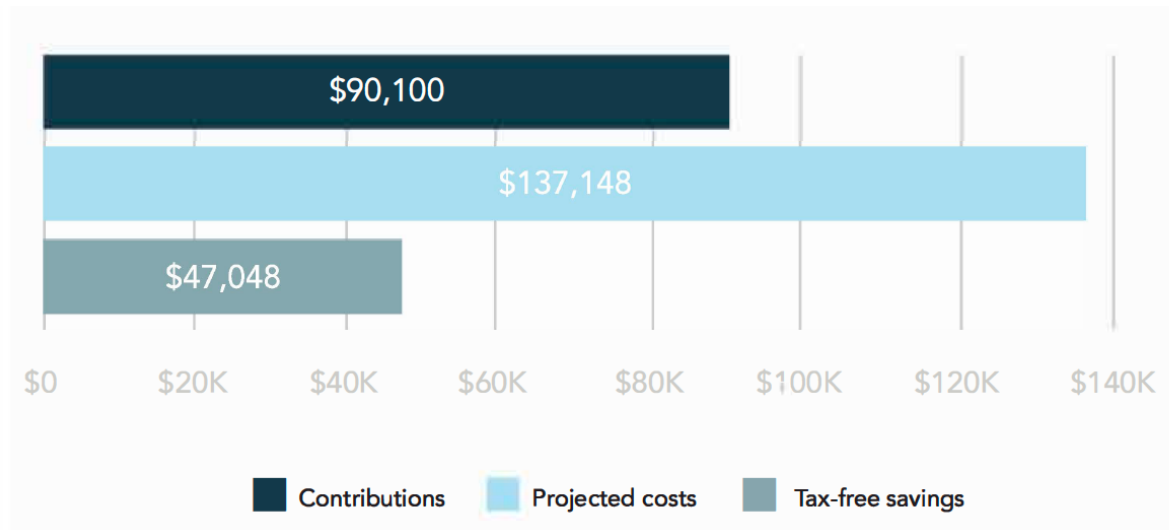
### 529 savings plan

Initial contribution: \$2,500

Monthly contribution: \$148 Compound interest (est): 6% per year

Cumulative savings: \$62,024.29

\*Average tuition and fees for all member colleges is \$43,724.



## PRIVATE COLLEGE 529 PLAN

by CollegeWell

# Saving Scenario 3

*Family prepays nearly 1.5 years of tuition, saving more than \$47,000, and their 529 savings plan balance is more than \$62,000 to pay additional college expenses.*

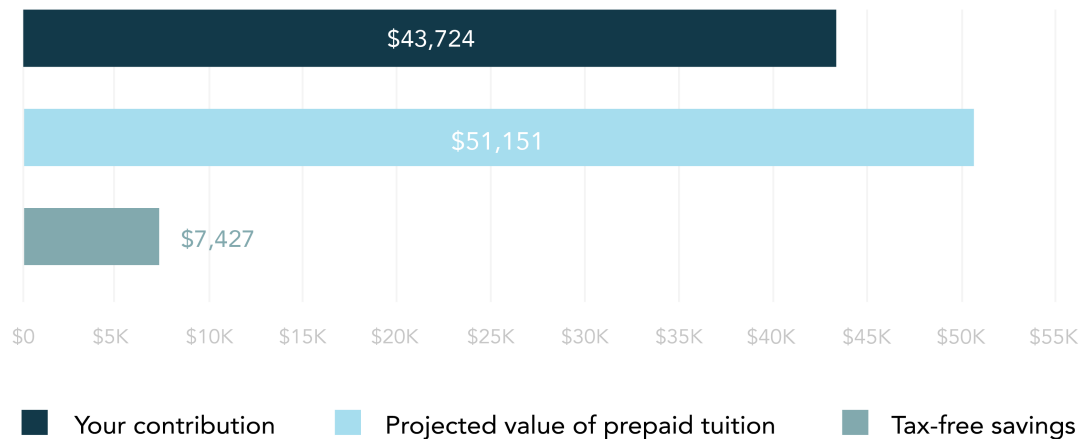
## Late-stage college saver

In this scenario, Bob and Gina have been saving in a traditional 529 plan and their daughter is now a freshmen in high school.

### Assumptions

College enrollment: 2025  
Initial contribution: \$43,724 in 2022  
Monthly contribution: \$0  
Tuition inflation (est): 4% per year

*\*Tuition certificates must be held for 36 months before use. Using average tuition and fees for all member colleges at \$43,724.*



# Saving Scenario 4

*Family prepays the average tuition and fee rate across all schools and saves nearly \$7,500 on the cost of tuition and fees.*

Jonathan Sparling  
[jonathan@pc529.com](mailto:jonathan@pc529.com)  
401-258-8859

### Visit Us Online

[www.privatecollege529.com](http://www.privatecollege529.com)  
[www.collegewell.com](http://www.collegewell.com)

### Take Me Directly There

<https://www.collegewell.com/financial-advisors/>

### Connect

[Linkedin.com/company/private-college-529-plan](https://www.linkedin.com/company/private-college-529-plan)

### Bookmark OPEN AN ACCOUNT

<https://access.pc529.com/Login/CreateUserProfile?createUserType=enroll>

**PRIVATE**  
**COLLEGE 529 PLAN**

by CollegeWell

**Contact  
Information**

CollegeWell and Private College 529 Plan (the Plan) are established and maintained by Tuition Plan Consortium, LLC (TPC). This material is provided for general and educational purposes only, and is not intended to provide legal, tax, or investment advice, or for use to avoid penalties that may be imposed under U.S federal tax laws. Intuition College Savings Solutions, LLC (Intuition) is the Plan Administrator. Participation in the Plan does not guarantee admission to any college or university. Tuition Certificates are neither insured nor guaranteed by the FDIC, TPC, any government agency, Intuition or their respective subcontractors and affiliates. However, Tuition Certificates are guaranteed by colleges and universities solely for tuition and mandatory fee credits. Please read the Disclosure Statement and Enrollment Agreement carefully and consider your financial objectives and risks before purchasing a Tuition Certificate. TPC, Intuition and their respective subcontractors and affiliates do not provide financial, legal or tax advice. Contact your attorney or other advisor regarding your specific legal, investment or tax situation.

Private College 529 Plan assets can be used to pay any qualified expense at any college or university, public or private. The tuition guarantee applies only to participating institutions. Outside the network, the value of the account is calculated as your total contributions adjusted for net investment returns subject to a maximum increase of 2 percent per year or a maximum loss of 2 percent per year, compounded annually. If the refunded amount is not used to pay qualified education expenses, the earnings portion will be subject to federal income tax and an additional 10 percent penalty. See Disclosure Statement for details. © 2022 Tuition Plan Consortium, LLC. All rights reserved. 7024-NLD-09202022.