

OKLAHOMA 529 AT WORK
PAYING FOR HIGHER EDUCATION
IS ONE OF THE MOST IMPORTANT
FINANCIAL GOALS FOR YOUR
EMPLOYEES WITH FAMILIES.

Bright futures built in Oklahoma

Oklahoma 529 at Work is a financial wellness program that makes it easy for your employees to save for their families' education. It allows them to save for education with tax-free growth potential and low fees. It's a benefit that can be worth thousands to your employees at no cost to you!

- **Easy to set up**
- **Easy to administer**
- **No employer cost**
- **No reporting**
- **No contract required**



FINANCIAL WELLNESS, SIMPLIFIED

Oklahoma 529 at Work is a financial wellness benefit designed to help your employees save for their children's or grandchildren's higher education, minimize student debt and help build a skilled Oklahoma workforce. With low fees, unique tax benefits and payroll direct deposits to college savings accounts, Oklahoma 529 at Work offers your employees one of the most effortless ways to achieve their college savings goals.

Administering Oklahoma 529 at Work is free and easy. Instructions for your employees are available at oklahoma529.com. Plus, Oklahoma 529 offers ongoing support at no charge during your annual benefits enrollment period or any other time throughout the year.

EMPLOYER INCENTIVE

Incorporate college savings into your incentive structure.

1. Employee opens an Oklahoma 529 account and shares their Ugift code with your HR Team.
2. Go to Ugift529.com and enter in the individual employee code.
3. Follow the instructions to contribute online or download and mail a pre-filled contribution form and check.

To learn more about Oklahoma 529 at Work and access FAQs, please visit oklahoma529.com.

To speak with an Oklahoma 529 Consultant, please call 1-877-654-7284.

Oklahoma 529 can help your financial wellness program



Download or order free brochures.



Request a college savings webinar.

Employee direct deposit into Oklahoma 529 is easy!

1. Employee opens an account at oklahoma529.com then adds direct deposit (if they wish).
2. Simple routing instructions are output for self-service payroll or may be printed for your HR team.



To learn more about the Oklahoma 529, its investment objectives, tax benefits, risks and costs, please see the Plan Description at oklahoma529.com. Read it carefully. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the Oklahoma 529. 2112590

