



529 College Savings Solutions

A 360-Degree Approach to Understanding and Growing the 529 College Savings Industry

Strategic Insight's (SI) 529 team provides essential insights and advice for firms and state agencies to remain competitive for years to come. Experienced in addressing the strategic challenges of more than 100 fund manufacturers, distributors, banks and service organizations, Strategic Insight zeros in on the distinctive trends that drive the college savings industry.

Subscription **Research**

529 College Savings **Quarterly Update**



- Executive reports providing in-depth analysis, commentary, and market analytics on 529 product, marketing, and distribution trends.
- Data sets cover 529 plan assets by state, program, program manager, primary distributor, and average account size by program.

529 **Quarterly Fee Analysis**



- Insightful analysis of 529 fees as compared across investment options, investment types, and distribution channels.
- Report covers program manager updates, contract expiration dates, and fee benchmarks and trends.

Weekly **Views on the News**



- A weekly compilation of the latest news and events impacting the college savings industry, along with expert commentary on what's driving trends in product development, marketing, and distribution.

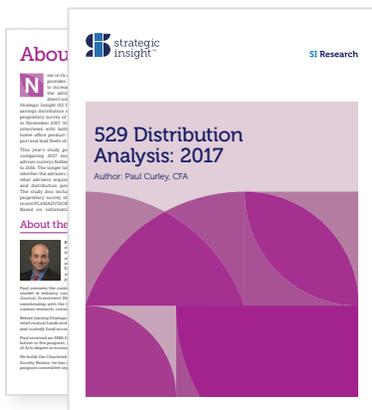
In-Depth Annual Research

529 Plan Industry Analysis



- Based on a proprietary survey of 1000+ consumers, the 529 Plan Industry Analysis report explores and highlights key trends driving growth over the next five years.
- Understand how current participants can help enhance product development, marketing, and distribution, as well as how entrants can best position against industry leaders.

529 Distribution Analysis



- This study provides actionable guidance of the adviser-sold, employer-sold, and direct-sold 529 products based on adviser and plan sponsor surveys and interviews with broker-dealer home offices.
- Use this study to understand distribution roadmaps to engage current channels and expand into new areas.

Interactive **Media and Services**



529 DASH NEWSLETTER

Reaching over 9000 subscribers, the industry's leading weekly e-newsletter provides the latest in industry news, key trends, and current discussion topics of those selling and servicing families and institutions in the college financial planning process.



529 INSIDERS WEBSITE

Access product training, news, best practices, data and research as they related to trends and challenges facing the college savings industry. Increase brand awareness with an engaged audience of advisers, accountants, estate planner and product providers.



529 WEBCASTS

Highlight your firm as an industry thought leader through facilitated discussions on trends, strategies, and opportunities plan advisers need to understand.



CONSULTING & CUSTOM PROJECTS

Driven by individual customer needs, customized solutions are available on a project-by-project basis.

529 CONFERENCE

Featuring 'Essentials' Seminar and ABLE Forum

SEP / 24-26 / 2018

JW Marriott Orlando, *Grande Lakes, Florida*

www.529conference.com

Join 529 industry leaders at the annual 529 Conference, where interactive sessions and networking events provide key insight into the latest product innovations, regulatory changes, and sales and investment strategies shaping the college savings landscape. Using a 360-degree industry perspective, attendees will take away a clear understanding of the ever-evolving tax, regulatory, investment, product, distribution and marketing structures impacting all angles of the industry today.