

Future Scholar 529 College Savings Plan

## Privacy Policy

Facts	What does Future Scholar 529 College Savings Plan do with your personal information?
<b>Why?</b>	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.
<b>What?</b>	<p>The types of personal information we collect and share depend on the product or service you have with us. This information can include:</p> <ul style="list-style-type: none"> <li>&gt; Social Security number and income</li> <li>&gt; Assets and transaction history</li> <li>&gt; Checking account information and wire transfer instructions</li> </ul> <p>When you are no longer our customer, we continue to share information about you as described in this notice.</p>
<b>How?</b>	All financial companies need to share customers' personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customers' personal information; the reasons Future Scholar 529 College Savings Plan chooses to share; and whether you can limit this sharing.

Reasons we can share your personal information	Does Future Scholar 529 College Savings Plan share?	Can you limit this sharing?
<b>For everyday business purposes</b> – such as to process your transactions, maintain your account(s), respond to court orders and legal investigations or report to credit bureaus	Yes	No
<b>For our marketing purposes</b> – to offer our products and services to you	Yes	No
<b>For joint marketing with other financial companies</b>	No	We don't share
<b>For our affiliates' everyday business purposes</b> – information about your transactions and experiences	No	We don't share
<b>For our affiliates' everyday business purposes</b> – information about your creditworthiness	No	We don't share
<b>For our affiliates to market to you</b>	No	We don't share
<b>For non-affiliates to market to you</b>	No	We don't share

**Questions?**

Call 888.244.5674 or go to  
[futurescholar.com/legal/privacyandsecurity](https://futurescholar.com/legal/privacyandsecurity)

## Who we are

Who is providing this notice?

The Future Scholar 529 College Savings Plan

## What we do

How does Future Scholar 529 College Savings Plan protect my personal information?

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

For more information on how we protect your personal information visit [futurescholar.com/legal/privacyandsecurity](https://futurescholar.com/legal/privacyandsecurity).

How does Future Scholar 529 College Savings Plan collect my personal information?

We collect your personal information, for example, when you:

- > Open an account or give us your contact information
- > Provide account information or make wire transfers
- > Make investments or withdrawals from your account

Why can't I limit all sharing?

Federal law gives you the right to limit only:

- > Sharing for affiliates' everyday business purposes — information about your creditworthiness
- > Affiliates from using your information to market to you
- > Sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing.

## Definitions

**Affiliates**

Companies related by common ownership or control. They can be financial and nonfinancial companies.

- > Future Scholar 529 College Savings Plan does not share personal information with affiliates.

**Non-affiliates**

Companies not related by common ownership or control. They can be financial and nonfinancial companies.

- > Future Scholar 529 College Savings Plan does not share with non-affiliates so they can market to you.

**Joint marketing**

A formal agreement between nonaffiliated financial companies that together market financial products or services to you.

- > Future Scholar 529 College Savings Plan doesn't jointly market.



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

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