

TD Ameritrade 529
College Savings Plan

Dear Financial Professional,

We wanted to share several important Plan updates with you. These changes will automatically take effect July 23, 2021. No action is required on your part.

- **NEW Plan Name.** The Plan is rebranding and changing its name to **Bloomwell 529 Education Savings Plan**. TD Ameritrade and TD Ameritrade Investment Management will no longer provide sub-administration or portfolio consulting services.
- **NEW Plan Logo.** You will see the Bloomwell 529 Education Savings Plan logo on all communications, statements, forms and online:



BLOOMWELL
529 EDUCATION SAVINGS

- **NEW Plan Website.** You will visit **Bloomwell529.com** for secure access to your clients' accounts, plan information and forms. Your and your clients' current login credentials (i.e., username and password) will not change. If you saved the current Plan website or online access portal as a "favorite" in your browser, you will want to update your bookmarks to **Bloomwell529.com**.
- **Lower Costs.** The Age-Based and Static Investment Options will see their expense ratios go down by 0.15% and the Individual Fund Investment Options will see a 0.05% decrease - helping keep more dollars working in your clients' college savings accounts.

You and your clients will receive a new Program Disclosure Statement in mid-July. Please review the "Frequently Asked Questions" enclosed or at **Bloomwell529.com** for additional details.

The State of Nebraska and Union Bank & Trust are excited for the Plan's new look and brand, and look forward to continuing to partner with you in helping your clients save for higher education. Thank you for your business.

Sincerely,

TD Ameritrade 529 College Savings Plan

An investor should consider the Plan's investment objectives, risks, charges and expenses before investing. The Program Disclosure Statement (Issuer's official statement), which contains more information, should be read carefully before investing. Investors should consider before investing whether their or their 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 and should consult their tax advisor, attorney and/or other qualified advisor regarding their specific tax, legal, or investment situation.

The TD Ameritrade 529 College Savings Plan (the "Plan") is sponsored by the State of Nebraska, administered by the Nebraska State Treasurer as trustee, and the Nebraska Investment Council provides investment oversight. The Plan offers a series of investment portfolios within the Nebraska Educational Savings Plan Trust (the "Trust"), which also offers other investment portfolios not affiliated with the Plan. The Trust serves as issuer ("Issuer"), Union Bank and Trust Company serves as program manager (the "Program Manager") and renders certain distribution services to the Plan. TD Ameritrade, Inc. serves as sub-administrator. TD Ameritrade Investment Management, LLC provides portfolio consulting services to the Nebraska Investment Council and the Program Manager. The Plan is intended to operate as a qualified tuition program.

Investments in the Plan are not guaranteed or insured by the Federal Deposit Insurance Corporation ("FDIC"), the Securities Investor Protection Corporation ("SIPC") or any other government agency and are not deposits or other obligations of any depository institution. Investments are not guaranteed or insured by the State of Nebraska, the Nebraska State Treasurer, the Nebraska Investment Council, the Program Manager, TD Ameritrade, Inc., TD Ameritrade Investment Management, LLC or their authorized agents or their affiliates, and are subject to investment risks, including loss of the principal amount invested.

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¹See the Program Disclosure Statement for additional information regarding qualified college costs. In general, earnings on non-qualified withdrawals are subject to federal and Nebraska state income taxes and a 10% federal penalty tax. Nebraska state income tax deductions may be subject to recapture in certain circumstances such as rollovers to another state's 529 plan or ABLE program, cancellations of a participation agreement, non-qualified withdrawals, or withdrawals used to pay K-12 tuition costs, registered apprenticeship program expenses, or qualified education loan repayments as described in the Program Disclosure Statement. Please consult your tax professional about your particular situation.

²Account owners may deduct for Nebraska income tax purposes contributions they make to their own account (and any other accounts they own in the Trust) up to an overall maximum of \$10,000 (\$5,000 if married, filing separately). Contributions in excess of \$10,000 cannot be carried over to a future year. For a minor-owned or UGMA/UTMA 529 account, the minor is considered the account owner for Nebraska state income tax deductions. The minor must file a Nebraska tax return for the year their contributions are made to be eligible for a tax deduction for their own contributions. In the case of a UGMA/UTMA 529 account, contributions by the parent/guardian listed as the Custodian on the UGMA/UTMA Plan account are also eligible for a Nebraska state tax deduction.