

# Planning, Saving and Dreaming Big

ISave 529 is here to help your education goals bloom.

## Treasurer's Message

Spring has arrived, and with it comes a fresh burst of energy for planning. As the days get longer and everything starts to bloom, it's the perfect time to give your education savings a little sunshine too.

Whether you're new to ISave 529™ or been with us for years, our team is here to help keep your education goals moving forward. No matter if you're just getting started or fine-tuning your strategy, we're excited to share tips and reminders to make the most of your savings journey.

Roby Smith  
Iowa State Treasurer

## Invest in Yourself

Think 529s are only for kids? Think again! It's never too late to learn – or to open an ISave 529 account. Adults can open an ISave 529 account in their own name and use it for their own education! This is especially useful for:

- Adults returning to finish a degree
- Professionals seeking new certifications
- Hobby learners pursuing structured programs

[Enroll now](#)



Don't forget! ISave 529 account owners, who are Iowa taxpayers, can make 2025 tax-year contributions through April 30, 2026, giving you extra time to maximize your state [tax benefits!](#)

## Manage Your Account from the READYSAVE™ 529 App

If you want an easy way to stay on top of your ISave 529 account, the [READYSAVE 529 app](#) is built for you. As an account owner, you can quickly manage your account while tracking progress toward your goals – all from your phone.

Why account owners love it:

- View account balances, transaction history and investment allocations
- Monitor your investment performance
- Make contributions
- Set up or adjust recurring contributions
- Withdraw funds
- Add a new beneficiary account
- Access and share your Ugift® code for easy gift-giving
- See how your savings compare to other savers



[Download READYSAVE 529 App from your phone](#)

### Account Owner Tip: Successor Account Owner

An important piece of housekeeping for your ISave 529 account is naming and updating your successor account owner. If something unexpected happens, your successor account owner is the person you designate to take over the account. Whether the funds are meant for a child, grandchild or even your own future learning, a successor account owner helps keep your plan on track.

If you already have a successor account owner, now is the perfect time to review your designation, make any updates to their contact information or designate a different successor account owner if circumstances have changed. If you're saving for more than one beneficiary, be sure to check each account as successor account owners are specific to each beneficiary.

### What happens next?

After the successor account owner notifies ISave 529 of the account owner's death, they will receive the required form. This must be returned with a certified copy of the death certificate and processed in good order before the change in ownership becomes effective.

[Log in to your account](#)

### Your Audience Has Questions – Our ISave 529 Experts Have Answers

Whether you're hosting a financial wellness workshop, a parent information night, a community event or an employee benefits fair, our experts can help your audience understand how ISave 529 can help plan for future education costs.

[Speaker Request form](#)



For additional details about the plan, read the [Program Description \(PDF\)](#).

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