



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Virginia: CollegeAmerica	American Balanced Fund	529-F	12.62%	8.14%	10.53%	6.84%	22	1	1	1	12.62%	8.14%	10.53%	6.84%	12	1	1	1
Virginia: CollegeAmerica	American Balanced Fund	529-A	12.35%	7.89%	10.28%	6.61%	29	2	2	2	5.90%	5.78%	8.99%	5.97%	160	88	17	4
Wisconsin: Edvest	Balanced Portfolio	NL	11.99%	7.89%	NA	NA	41	2	NA	NA	11.99%	7.89%	NA	NA	20	2	NA	NA
Wisconsin: Tomorrow's Scholar 529 Plan	TIAA-CREF Balanced Option	W	11.60%	7.77%	NA	NA	60	4	NA	NA	11.60%	7.77%	NA	NA	32	3	NA	NA
Virginia: CollegeAmerica	American Balanced Fund	529-E	12.10%	7.64%	10.01%	6.33%	38	6	3	4	12.10%	7.64%	10.01%	6.33%	18	5	2	3
Wisconsin: Tomorrow's Scholar 529 Plan	TIAA-CREF Balanced Option	A	11.36%	7.51%	NA	NA	77	7	NA	NA	6.08%	5.77%	NA	NA	156	90	NA	NA
Tennessee: TNStars College Savings 529 Program	Age-Based 5-10	NL	13.08%	7.48%	9.39%	NA	13	8	9	NA	13.08%	7.48%	9.39%	NA	7	6	6	NA
California: ScholarShare 529	Active Age-Based: Age Band 9-10	NL	13.60%	7.44%	9.13%	NA	4	9	13	NA	13.60%	7.44%	9.13%	NA	2	7	10	NA
Kansas: Learning Quest 529 Education Savings Program (Direct-sold)	Balanced Index Portfolio	NL	10.61%	7.35%	9.07%	6.47%	128	10	20	3	10.61%	7.35%	9.07%	6.47%	85	8	16	2
Oregon: Oregon College Savings Plan	Balanced Index Portfolio	A (NL)	10.75%	7.30%	9.13%	NA	120	11	13	NA	10.75%	7.30%	9.13%	NA	76	9	10	NA
South Carolina: Future Scholar 529 College Savings Plan (Direct-sold)	Future Scholar Moderate Growth Portfolio	NL	11.25%	7.26%	8.62%	5.16%	82	12	36	28	11.25%	7.26%	8.62%	5.16%	46	10	27	24
Nevada: The Vanguard 529 Savings Plan	Vanguard STAR Portfolio	NL	13.12%	7.25%	9.21%	5.87%	9	13	11	5	13.12%	7.25%	9.21%	5.87%	5	11	8	5
Wisconsin: Tomorrow's Scholar 529 Plan	TIAA-CREF Balanced Option	C1	11.05%	7.22%	NA	NA	99	14	NA	NA	10.55%	7.22%	NA	NA	88	12	NA	NA
South Carolina: Future Scholar 529 College Savings Plan (Advisor-sold)	Columbia Moderate Growth 529 Portfolio	I	11.82%	7.17%	8.94%	5.05%	49	15	24	31	11.82%	7.17%	8.94%	5.05%	23	13	19	27
Virginia: CollegeAmerica	American Funds Balanced Portfolio	529-F	12.32%	7.17%	9.21%	NA	30	15	11	NA	12.32%	7.17%	9.21%	NA	15	13	8	NA
New York: New York's 529 Advisor-Guided College Savings Plan	JPMorgan 529 Moderate Portfolio	Advisor	13.31%	7.07%	8.72%	NA	7	17	31	NA	13.31%	7.07%	8.72%	NA	4	15	23	NA
Virginia: CollegeAmerica	American Balanced Fund	529-C	11.51%	7.07%	9.44%	5.78%	67	17	8	9	10.51%	7.07%	9.44%	5.78%	92	15	5	9
Maine: NextGen College Investing Plan -- Client Direct Series	iShares Age-Based 8-10 Years Portfolio (ETF)	D (NL)	10.29%	7.06%	8.26%	NA	143	19	50	NA	10.29%	7.06%	8.26%	NA	97	17	40	NA
Maryland: Maryland 529 -- College Investment Plan	Portfolio 2024	NL	12.90%	7.04%	9.92%	5.14%	18	20	5	29	12.90%	7.04%	9.92%	5.14%	10	18	4	25
Alaska: University of Alaska College Savings Plan	Balanced Portfolio	NL	12.92%	7.04%	8.82%	5.87%	16	20	28	5	12.92%	7.04%	8.82%	5.87%	8	18	21	5
Alaska: T. Rowe Price College Savings Plan	Balanced Portfolio	NL	12.92%	7.04%	8.82%	5.87%	16	20	28	5	12.92%	7.04%	8.82%	5.87%	8	18	21	5
Nebraska: Nebraska Education Savings Trust - Direct College Savings Plan	Age-Based Aggressive 11-14	NL	11.90%	7.03%	8.29%	NA	46	23	48	NA	11.90%	7.03%	8.29%	NA	21	21	38	NA

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Ohio: Ohio CollegeAdvantage Direct 529 Savings Plan	Advantage Ages 6 to 9	O (NL)	11.11%	6.93%	10.00%	NA	94	24	4	NA	11.11%	6.93%	10.00%	NA	54	22	3	NA
Virginia: CollegeAmerica	American Funds Balanced Portfolio	529-A	12.00%	6.92%	8.96%	NA	39	25	23	NA	5.55%	4.83%	7.67%	NA	164	126	76	NA
South Carolina: Future Scholar 529 College Savings Plan (Advisor-sold)	Columbia Moderate Growth 529 Portfolio	A	11.55%	6.91%	8.68%	4.69%	64	26	33	43	7.37%	5.54%	7.85%	4.29%	145	98	69	50
Virginia: CollegeAmerica	The Income Fund of America	529-F	11.56%	6.90%	9.34%	5.79%	63	27	10	8	11.56%	6.90%	9.34%	5.79%	34	23	7	8
Oklahoma: Oklahoma College Savings Plan	Balanced Option	NL	12.00%	6.83%	8.00%	5.27%	39	28	68	24	12.00%	6.83%	8.00%	5.27%	19	24	54	20
New York: New York's 529 Advisor-Guided College Savings Plan	JPMorgan 529 Moderate Portfolio	A	13.10%	6.79%	8.45%	NA	12	29	43	NA	7.17%	4.88%	7.29%	NA	147	125	98	NA
Nebraska: Nebraska Education Savings Trust -- Advisor College Savings Pla	Age-Based Aggressive 11-14	A	12.43%	6.78%	8.16%	NA	24	30	53	NA	8.50%	5.52%	7.40%	NA	128	100	89	NA
Maryland: Maryland 529 -- College Investment Plan	Balanced Portfolio	NL	11.68%	6.76%	8.60%	5.78%	58	31	38	9	11.68%	6.76%	8.60%	5.78%	31	25	29	9
Maine: NextGen College Investing Plan -- Client Direct Series	BlackRock Age-Based 8-10 Years Portfolio	D (NL)	11.72%	6.75%	8.62%	4.66%	54	32	36	44	11.72%	6.75%	8.62%	4.66%	29	26	27	42
Wisconsin: Tomorrow's Scholar 529 Plan	TIAA-CREF Balanced Option	AR	10.55%	6.71%	NA	NA	133	33	NA	NA	9.55%	6.71%	NA	NA	111	27	NA	NA
Virginia: CollegeAmerica	The Income Fund of America	529-A	11.35%	6.67%	9.10%	5.57%	78	34	19	12	4.94%	4.58%	7.81%	4.95%	168	135	70	31
Virginia: CollegeAmerica	American Funds Balanced Portfolio	529-E	11.82%	6.67%	8.70%	NA	49	34	32	NA	11.82%	6.67%	8.70%	NA	23	28	24	NA
Maine: NextGen College Investing Plan -- Client Select Series	iShares Age-Based 8-10 Years Portfolio	A	9.92%	6.66%	NA	NA	150	36	NA	NA	6.35%	5.49%	NA	NA	155	103	NA	NA
Nevada: Putnam 529 for America	Age-Based - Age 9	A	13.26%	6.66%	9.80%	NA	8	36	6	NA	6.75%	4.58%	8.50%	NA	151	135	34	NA
California: ScholarShare 529	Passive Age-Based: Age Band 9-10	NL	11.01%	6.65%	8.09%	NA	102	38	56	NA	11.01%	6.65%	8.09%	NA	60	29	45	NA
South Carolina: Future Scholar 529 College Savings Plan (Advisor-sold)	Columbia Moderate Growth 529 Portfolio	E	11.27%	6.64%	8.41%	4.45%	80	39	46	52	11.27%	6.64%	8.41%	4.45%	43	30	35	49
Nebraska: TD Ameritrade 529 College Savings Plan	Age-Based Aggressive 11-14	NL	11.53%	6.63%	8.08%	NA	66	40	60	NA	11.53%	6.63%	8.08%	NA	35	31	48	NA
West Virginia: SMART529 WV Direct College Savings Plan	SMART529 WV Direct Balanced Portfolio	D (NL)	11.87%	6.62%	8.28%	4.71%	47	41	49	41	11.87%	6.62%	8.28%	4.71%	22	32	39	39
Oregon: MFS 529 Savings Plan	MFS Total Return Fund	529-A	9.77%	6.61%	8.81%	5.41%	155	42	30	15	3.45%	4.53%	7.52%	4.79%	177	137	82	33
Wisconsin: Edvest	Age-Based Option: Age Band 9-10	NL	11.04%	6.60%	NA	NA	100	43	NA	NA	11.04%	6.60%	NA	NA	58	33	NA	NA
Pennsylvania: Pennsylvania 529 Investment Plan	Moderate Growth Portfolio	I (NL)	10.70%	6.60%	8.05%	5.58%	123	43	63	11	10.70%	6.60%	8.05%	5.58%	79	33	50	11
Nevada: Putnam 529 for America	Putnam 529 Balanced	D	13.00%	6.60%	8.89%	NA	14	43	25	NA	9.04%	5.34%	8.12%	NA	126	105	43	NA

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Nevada: Putnam 529 for America	Putnam 529 Balanced	A	13.00%	6.58%	8.89%	NA	14	46	25	NA	6.50%	4.49%	7.61%	NA	153	139	79	NA
Louisiana: START Saving Program	Moderate: Ages 0 through 5	NL	10.86%	6.55%	8.08%	4.96%	109	47	60	35	10.86%	6.55%	8.08%	4.96%	67	35	48	30
Iowa: College Savings Iowa	Moderate Growth Portfolio	NL	10.73%	6.54%	8.05%	5.43%	122	48	63	14	10.73%	6.54%	8.05%	5.43%	78	36	50	13
Kansas: Schwab 529 College Savings Plan	Moderate Index Portfolio	NL	11.04%	6.53%	NA	NA	100	49	NA	NA	11.04%	6.53%	NA	NA	58	37	NA	NA
Missouri: MOST - Missouri's 529 College Savings Plan (Direct-sold)	Vanguard Moderate Growth Portfolio	NL	10.74%	6.50%	8.00%	5.26%	121	50	68	25	10.74%	6.50%	8.00%	5.26%	77	38	54	21
Minnesota: Minnesota College Savings Plan	Age Band 9-10 Years	NL	10.66%	6.49%	NA	NA	126	51	NA	NA	10.66%	6.49%	NA	NA	82	39	NA	NA
Delaware: Delaware College Investment Plan	Fidelity Funds: DE Portfolio 2024	NL	10.80%	6.48%	8.58%	3.99%	113	52	42	58	10.80%	6.48%	8.58%	3.99%	70	40	33	55
Indiana: CollegeChoice 529 Direct Savings Plan	Age-Based Option: Moderate Growth Portfolio (Age 8-	NL	11.22%	6.47%	7.98%	NA	85	53	70	NA	11.22%	6.47%	7.98%	NA	49	41	56	NA
New Hampshire: UNIQUE College Investing Plan	Fidelity Funds: NH Portfolio 2024	NL	10.79%	6.47%	8.60%	4.00%	115	53	38	56	10.79%	6.47%	8.60%	4.00%	72	41	29	53
Minnesota: Minnesota College Savings Plan	Moderate Option (formerly Balanced Option)	NL	10.55%	6.46%	7.58%	5.02%	133	55	91	34	10.55%	6.46%	7.58%	5.02%	88	43	81	29
Massachusetts: U.Fund College Investing Plan	Fidelity Funds: MA Portfolio 2024	NL	10.79%	6.46%	8.59%	4.03%	115	55	40	55	10.79%	6.46%	8.59%	4.03%	72	43	31	52
Arizona: Fidelity Arizona College Savings Plan	Fidelity Funds: Portfolio 2024	NL	10.81%	6.46%	8.59%	4.00%	112	55	40	56	10.81%	6.46%	8.59%	4.00%	69	43	31	53
New Mexico: Scholar'sEdge	Portfolio 60 (formerly Moderate Portfolio)	A	12.25%	6.43%	8.07%	3.45%	35	58	62	68	6.92%	4.71%	7.02%	2.95%	150	133	105	73
Nevada: Putnam 529 for America	Age-Based - Age 10	A	12.52%	6.43%	9.46%	NA	23	58	7	NA	6.05%	4.35%	8.18%	NA	157	140	42	NA
Virginia: CollegeAmerica	The Income Fund of America	529-E	11.08%	6.42%	8.83%	5.29%	97	60	27	22	11.08%	6.42%	8.83%	5.29%	56	46	20	18
Georgia: Path2College 529 Plan	Aggressive Managed Allocation Option: Age Band 13-	NL	10.69%	6.42%	NA	NA	124	60	NA	NA	10.69%	6.42%	NA	NA	80	46	NA	NA
Michigan: Michigan Education Savings Program	Balanced Option	NL	10.08%	6.42%	7.77%	5.32%	148	60	85	19	10.08%	6.42%	7.77%	5.32%	103	46	72	16
Virginia: Invest529	Moderate Growth	NL	10.76%	6.41%	7.94%	4.77%	117	63	78	38	10.76%	6.41%	7.94%	4.77%	74	49	63	36
Kansas: Learning Quest 529 Education Savings Program (Direct-sold)	Index Track: Moderate Index Portfolio	NL	10.59%	6.38%	7.98%	5.21%	130	64	70	27	10.59%	6.38%	7.98%	5.21%	86	50	56	23
Michigan: Michigan Education Savings Program	Moderate Age-Based: Age Band 9-10	NL	9.82%	6.36%	NA	NA	153	65	NA	NA	9.82%	6.36%	NA	NA	106	51	NA	NA
New Mexico: The Education Plan's College Savings Program	Custom Choice Portfolio 60 (formerly Moderate Portfo	NL	11.37%	6.36%	8.09%	3.11%	76	65	56	71	11.37%	6.36%	8.09%	3.11%	42	51	45	68
New Mexico: The Education Plan's College Savings Program	Custom Choice Index Portfolio 60 (formerly Moderate	NL	10.55%	6.33%	8.01%	NA	133	67	66	NA	10.55%	6.33%	8.01%	NA	88	53	53	NA

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Balanced Option (formerly Moderate Growt	W	11.45%	6.31%	NA	NA	70	68	NA	NA	11.45%	6.31%	NA	NA	36	54	NA	NA
Illinois: Bright Directions Advisor-Guided 529 College Savings Program	Fund 60	F	13.39%	6.30%	8.04%	5.30%	5	70	65	20	13.39%	6.30%	8.04%	5.30%	3	56	52	17
Maine: NextGen College Investing Plan -- Client Select Series	BlackRock Age-Based 8-10 Years Portfolio	A	11.33%	6.30%	8.22%	4.30%	79	70	52	53	7.72%	5.14%	7.51%	3.96%	139	113	83	56
New Hampshire: UNIQUE College Investing Plan	NH Portfolio 2027 Fidelity Index	NL	11.25%	6.29%	9.12%	NA	82	72	16	NA	11.25%	6.29%	9.12%	NA	46	57	13	NA
Massachusetts: U.Fund College Investing Plan	Fidelity Index Fund: MA Portfolio 2027	NL	11.25%	6.29%	9.12%	NA	82	72	16	NA	11.25%	6.29%	9.12%	NA	46	57	13	NA
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Age 11-12 Option	W	11.38%	6.29%	NA	NA	74	72	NA	NA	11.38%	6.29%	NA	NA	40	57	NA	NA
Arizona: Fidelity Arizona College Savings Plan	Fidelity Index Fund: Portfolio 2027	NL	11.22%	6.28%	9.12%	NA	85	76	16	NA	11.22%	6.28%	9.12%	NA	49	61	13	NA
Delaware: Delaware College Investment Plan	Fidelity Index Fund: Portfolio 2027	NL	11.22%	6.27%	9.13%	NA	85	77	13	NA	11.22%	6.27%	9.13%	NA	49	62	10	NA
Nevada: USAA 529 College Savings Plan	Moderately Aggressive	NL	12.29%	6.21%	7.42%	5.40%	33	78	97	17	12.29%	6.21%	7.42%	5.40%	17	63	88	14
Colorado: Scholars Choice College Savings Program	Portfolio Three: Age-Based 7-9	A	11.83%	6.20%	8.44%	5.30%	48	79	45	20	7.93%	4.94%	7.68%	4.92%	135	122	74	32
Colorado: Scholars Choice College Savings Program	Portfolio Three: Age-Based 7-9	O	11.78%	6.15%	8.39%	5.25%	51	80	47	26	11.78%	6.15%	8.39%	5.25%	26	64	36	22
Kentucky: Kentucky Education Savings Plan Trust	Balanced	NL	10.51%	6.15%	7.35%	NA	136	80	100	NA	10.51%	6.15%	7.35%	NA	92	64	92	NA
South Carolina: Future Scholar 529 College Savings Plan (Advisor-sold)	Columbia Moderate Growth 529 Portfolio	C	10.69%	6.12%	7.86%	3.94%	124	82	84	59	9.69%	6.12%	7.86%	3.94%	108	66	68	57
Delaware: Delaware College Investment Plan	Multi-Firm Fund: Portfolio 2024	NL	10.96%	6.07%	7.97%	NA	105	83	76	NA	10.96%	6.07%	7.97%	NA	62	67	62	NA
New Hampshire: UNIQUE College Investing Plan	Multi-Firm Fund: Portfolio 2024	NL	10.95%	6.07%	7.98%	NA	106	83	70	NA	10.95%	6.07%	7.98%	NA	63	67	56	NA
Virginia: CollegeAmerica	American Funds Balanced Portfolio	529-C	11.13%	6.06%	8.11%	NA	93	85	54	NA	10.13%	6.06%	8.11%	NA	101	69	44	NA
Massachusetts: U.Fund College Investing Plan	Multi-Firm Fund: Portfolio 2024	NL	10.94%	6.06%	7.98%	NA	107	85	70	NA	10.94%	6.06%	7.98%	NA	64	69	56	NA
Arizona: Fidelity Arizona College Savings Plan	Multi-Firm Fund: Portfolio 2024	NL	10.97%	6.06%	7.98%	NA	104	85	70	NA	10.97%	6.06%	7.98%	NA	61	69	56	NA
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Balanced Option (formerly Moderate Growt	A	11.19%	6.05%	NA	NA	89	88	NA	NA	5.87%	4.34%	NA	NA	161	141	NA	NA
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Age 11-12 Option	A	11.10%	6.05%	NA	NA	95	88	NA	NA	5.79%	4.34%	NA	NA	163	141	NA	NA
Illinois: Bright Directions Advisor-Guided 529 College Savings Program	Fund 60	A	13.11%	6.03%	7.77%	5.04%	11	90	85	32	9.15%	4.78%	7.01%	4.67%	125	129	106	41
Illinois: Bright Directions Advisor-Guided 529 College Savings Program	Fund 60	E	13.12%	6.03%	7.77%	5.04%	9	90	85	32	13.12%	6.03%	7.77%	5.04%	5	72	72	28

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
New Hampshire: Fidelity Advisor 529 Plan	FA 529 Portfolio 2025	A	11.18%	6.03%	8.45%	3.74%	90	90	43	62	4.79%	3.96%	7.17%	3.12%	172	151	103	67
New York: New York's 529 Advisor-Guided College Savings Plan	JPMorgan 529 Moderate Portfolio	C	12.26%	6.02%	7.64%	NA	34	93	89	NA	11.26%	6.02%	7.64%	NA	44	73	77	NA
Nebraska: Nebraska Education Savings Trust -- Advisor College Savings Pla	Age-Based Aggressive 11-14	C	11.63%	5.97%	7.36%	NA	59	94	99	NA	10.63%	5.97%	7.36%	NA	83	74	91	NA
Texas: Texas College Savings Plan	Blended Balanced Portfolio	NL	11.71%	5.97%	7.13%	NA	55	94	112	NA	11.71%	5.97%	7.13%	NA	30	74	104	NA
Kansas: Schwab 529 College Savings Plan	Moderate Portfolio	NL	11.15%	5.93%	7.48%	5.29%	92	96	94	22	11.15%	5.93%	7.48%	5.29%	52	76	85	18
Oregon: MFS 529 Savings Plan	MFS Moderate Allocation Fund	529-A	9.62%	5.92%	7.18%	5.41%	157	97	110	15	3.32%	3.85%	5.92%	4.79%	178	153	129	33
Virginia: Invest529	2027 Portfolio	NL	9.91%	5.91%	7.35%	NA	151	98	100	NA	9.91%	5.91%	7.35%	NA	105	77	92	NA
Ohio: BlackRock CollegeAdvantage Advisor 529 Savings Plan	BlackRock Moderate Portfolio Option	A	12.32%	5.90%	8.01%	NA	30	99	66	NA	6.43%	4.01%	6.85%	NA	154	149	111	NA
Alabama: CollegeCounts 529 Fund	Target Fund 60	T	10.24%	5.89%	7.19%	NA	146	100	109	NA	10.24%	5.89%	7.19%	NA	98	78	102	NA
Nevada: Putnam 529 for America	Age-Based - Age 9	B	12.41%	5.89%	8.97%	NA	25	100	21	NA	7.41%	4.99%	8.69%	NA	142	121	25	NA
Arkansas: iShares 529 Plan	iShares Moderate Portfolio (ETF)	F	9.24%	5.88%	6.82%	NA	163	102	120	NA	9.24%	5.88%	6.82%	NA	121	79	112	NA
Nevada: Putnam 529 for America	Age-Based - Age 9	C	12.41%	5.87%	8.97%	NA	25	104	21	NA	11.41%	5.87%	8.97%	NA	38	81	18	NA
Maine: NextGen College Investing Plan -- Client Select Series	iShares Age-Based 8-10 Years Portfolio	C	9.04%	5.85%	NA	NA	167	105	NA	NA	8.04%	5.85%	NA	NA	133	82	NA	NA
Texas: Texas College Savings Plan	Index Balanced Portfolio	NL	10.23%	5.84%	7.38%	NA	147	106	98	NA	10.23%	5.84%	7.38%	NA	99	83	90	NA
Virginia: CollegeAmerica	The Income Fund of America	529-C	10.45%	5.84%	8.25%	4.73%	137	106	51	40	9.45%	5.84%	8.25%	4.73%	113	83	41	38
West Virginia: SMART529 Select	SMART529 Select Moderate Growth Portfolio	NL	11.09%	5.82%	7.94%	4.63%	96	108	78	47	11.09%	5.82%	7.94%	4.63%	55	85	63	46
Oregon: MFS 529 Savings Plan	MFS Total Return Fund	529-B	8.88%	5.81%	7.97%	4.66%	169	109	76	44	4.88%	4.90%	7.68%	4.66%	170	123	74	42
Nevada: Putnam 529 for America	Putnam 529 Balanced	C	12.14%	5.80%	8.09%	NA	36	110	56	NA	11.14%	5.80%	8.09%	NA	53	86	45	NA
Nevada: Putnam 529 for America	Putnam 529 Balanced	B	12.14%	5.80%	8.09%	NA	36	110	56	NA	7.14%	4.90%	7.80%	NA	148	123	71	NA
Oregon: MFS 529 Savings Plan	MFS Total Return Fund	529-C	8.91%	5.79%	7.98%	4.65%	168	112	70	46	7.91%	5.79%	7.98%	4.65%	136	87	56	44
Indiana: CollegeChoice Advisor 529 Savings Plan	2022 Enrollment Portfolio	A	9.20%	5.79%	8.11%	NA	165	112	54	NA	3.48%	3.91%	6.95%	NA	176	152	109	NA
Kansas: Learning Quest 529 Education Savings Program (Direct-sold)	60% Equity (formerly Moderate) Portfolio	NL	9.61%	5.78%	7.31%	5.06%	158	114	105	30	9.61%	5.78%	7.31%	5.06%	109	88	97	26

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC





Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Illinois: Bright Directions Advisor-Guided 529 College Savings Program	Fund 60	C	12.80%	5.76%	7.49%	4.78%	20	115	93	37	12.80%	5.76%	7.49%	4.78%	11	91	84	35
Nebraska: State Farm College Savings Plan	OppenheimerFunds Balanced Portfolio	A	10.43%	5.76%	7.58%	NA	139	115	91	NA	4.36%	3.79%	6.37%	NA	174	154	121	NA
Nevada: SSGA Upromise 529 Plan	SSGA College 2027 Portfolio	NL	9.20%	5.73%	7.87%	NA	165	117	83	NA	9.20%	5.73%	7.87%	NA	123	92	67	NA
Alabama: CollegeCounts 529 Fund Advisor Plan	Target Fund 60	F	12.32%	5.68%	6.89%	NA	30	118	118	NA	12.32%	5.68%	6.89%	NA	15	93	110	NA
Colorado: Scholars Choice College Savings Program	Portfolio Three: Age-Based 7-9	C	11.26%	5.67%	7.90%	4.77%	81	119	81	38	11.26%	5.67%	7.90%	4.77%	44	94	66	36
Arizona: Ivy InvestEd 529 Plan	InvestEd Balanced Portfolio	A	11.95%	5.66%	7.88%	4.92%	44	120	82	36	9.16%	4.77%	7.32%	4.65%	124	130	95	44
Nevada: Putnam 529 for America	Age-Based - Age 10	B	11.69%	5.63%	8.66%	NA	56	121	34	NA	6.69%	4.73%	8.37%	NA	152	131	37	NA
Nevada: Putnam 529 for America	Age-Based - Age 10	C	11.69%	5.63%	8.66%	NA	56	121	34	NA	10.69%	5.63%	8.66%	NA	80	95	26	NA
New Mexico: Scholar'sEdge	Portfolio 60 (formerly Moderate Portfolio)	C	11.40%	5.62%	7.23%	2.68%	72	123	107	79	10.40%	5.62%	7.26%	2.68%	96	96	100	78
Utah: Utah Educational Savings Plan (UESP)	Age-Based Aggressive Domestic: 13-14	NL	8.27%	5.59%	7.01%	5.33%	179	124	116	18	8.27%	5.59%	7.01%	5.33%	131	97	106	15
Maine: NextGen College Investing Plan -- Client Select Series	BlackRock Age-Based 8-10 Years Portfolio	C	10.56%	5.54%	7.44%	3.52%	132	125	96	66	9.56%	5.54%	7.44%	3.52%	110	98	87	63
Kansas: Learning Quest Advisor	60% Equity (formerly Moderate) Portfolio	A	9.47%	5.53%	7.15%	4.47%	159	126	111	51	3.23%	3.48%	5.90%	3.86%	179	158	130	59
Texas: Lonestar 529 Plan	Balanced Portfolio	A	12.40%	5.53%	6.36%	NA	27	126	131	NA	5.95%	3.47%	5.11%	NA	159	159	141	NA
Illinois: Bright Start Advisor-Sold College Savings Program	Advisor Age Based 10-11 Years Portfolio	H	11.40%	5.52%	7.28%	3.03%	72	128	106	72	11.40%	5.52%	7.28%	3.03%	39	100	99	69
New Hampshire: Fidelity Advisor 529 Plan	FA 529 Portfolio 2025	P	10.58%	5.50%	7.91%	3.23%	131	129	80	69	10.58%	5.50%	7.91%	3.23%	87	102	65	65
Alaska: John Hancock Freedom 529	Multimanager Lifestyle Balanced 529 Portfolio	A	11.60%	5.48%	7.32%	4.50%	60	130	103	50	6.02%	3.69%	6.17%	3.94%	158	156	125	57
Colorado: Scholars Choice College Savings Program	Portfolio Three: Age-Based 7-9	B	11.00%	5.45%	7.68%	4.71%	103	131	88	41	8.50%	5.00%	7.60%	4.71%	128	120	80	39
Alabama: CollegeCounts 529 Fund Advisor Plan	Target Fund 60	A	11.97%	5.40%	6.62%	NA	43	132	124	NA	8.05%	4.16%	5.86%	NA	132	146	133	NA
Oregon: Oregon College Savings Plan	Age Band 9-10	A (NL)	10.80%	5.37%	6.06%	NA	113	133	137	NA	10.80%	5.37%	6.06%	NA	70	104	127	NA
South Dakota: CollegeAccess 529 (Direct-sold)	Age-Based 2 (Ages 9-10) (previously Age-Based 7-10) SD-D (NL)	SD-D (NL)	14.49%	5.28%	7.46%	4.22%	1	134	95	54	14.49%	5.28%	7.46%	4.22%	1	106	86	51
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Balanced Option (formerly Moderate Growt	C	10.34%	5.27%	NA	NA	140	135	NA	NA	9.34%	5.27%	NA	NA	116	107	NA	NA
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Age 11-12 Option	C	10.34%	5.27%	NA	NA	140	135	NA	NA	9.34%	5.27%	NA	NA	116	107	NA	NA

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Illinois: Bright Start Advisor-Sold College Savings Program	Advisor Age Based 10-11 Years Portfolio	A	11.16%	5.24%	7.02%	2.77%	91	137	115	76	7.27%	4.00%	6.26%	2.41%	146	150	123	80
Illinois: Bright Start Advisor-Sold College Savings Program	Advisor Age Based 10-11 Years Portfolio	G	11.07%	5.24%	7.00%	2.77%	98	137	117	76	11.07%	5.24%	7.00%	2.77%	57	109	108	76
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Age 11-12 Option	AR	10.26%	5.24%	NA	NA	145	137	NA	NA	9.26%	5.24%	NA	NA	120	109	NA	NA
New Hampshire: Fidelity Advisor 529 Plan	FA 529 Portfolio 2025	C	10.33%	5.23%	7.63%	2.97%	142	140	90	74	9.33%	5.23%	7.63%	2.97%	118	111	78	72
Wisconsin: Tomorrow's Scholar 529 Plan	Voya 529 Balanced Option (formerly Moderate Growt	AR	10.27%	5.21%	NA	NA	144	141	NA	NA	9.27%	5.21%	NA	NA	119	112	NA	NA
Alabama: CollegeCounts 529 Fund Advisor Plan	Target Fund 60	C	11.75%	5.13%	6.35%	NA	52	142	132	NA	11.75%	5.13%	6.35%	NA	27	114	122	NA
Oregon: MFS 529 Savings Plan	MFS Moderate Allocation Fund	529-B	8.75%	5.12%	6.37%	4.63%	172	143	130	47	4.75%	4.21%	6.06%	4.63%	173	145	127	46
Oregon: MFS 529 Savings Plan	MFS Moderate Allocation Fund	529-C	8.81%	5.12%	6.38%	4.62%	171	143	128	49	7.81%	5.12%	6.38%	4.62%	137	115	119	48
Ohio: BlackRock CollegeAdvantage Advisor 529 Savings Plan	BlackRock Moderate Portfolio Option	C	11.49%	5.11%	7.21%	NA	68	145	108	NA	10.49%	5.11%	7.21%	NA	94	116	101	NA
Connecticut: Connecticut Higher Education Trust (CHET) -- Advisor Plan	CHET Advisor Age-Based Portfolio 10-11	E	12.36%	5.10%	7.35%	NA	28	146	100	NA	12.36%	5.10%	7.35%	NA	13	117	92	NA
Iowa: IAdvisor 529 Plan	IAdvisor 529 Moderate	A	8.85%	5.06%	NA	NA	170	147	NA	NA	3.65%	3.37%	NA	NA	175	161	NA	NA
Nebraska: State Farm College Savings Plan	OppenheimerFunds Balanced Portfolio	B	9.86%	5.05%	6.83%	NA	152	148	119	NA	4.86%	4.14%	6.53%	NA	171	147	115	NA
Indiana: CollegeChoice Advisor 529 Savings Plan	2022 Enrollment Portfolio	C	8.38%	5.03%	7.32%	NA	176	149	103	NA	7.38%	5.03%	7.32%	NA	143	118	95	NA
Utah: Utah Educational Savings Plan (UESP)	Age-Based Aggressive Global: 13-14	NL	8.36%	5.01%	6.16%	5.48%	178	150	136	13	8.36%	5.01%	6.16%	5.48%	130	119	126	12
Illinois: Bright Start Advisor-Sold College Savings Program	Advisor Age Based 10-11 Years Portfolio	C	10.76%	4.98%	6.74%	2.51%	117	151	122	80	10.21%	4.80%	6.64%	2.46%	100	127	114	79
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 2 (Ages 9-10) (previously Age-Based 7-10)	SD-A	14.07%	4.93%	7.08%	3.86%	2	152	113	60	7.80%	2.97%	5.88%	3.27%	138	162	132	64
Connecticut: Connecticut Higher Education Trust (CHET) -- Advisor Plan	CHET Advisor Age-Based Portfolio 10-11	A	11.99%	4.83%	7.06%	NA	41	153	114	NA	5.83%	2.87%	5.86%	NA	162	163	133	NA
Kansas: Learning Quest Advisor	60% Equity (formerly Moderate) Portfolio	C	8.66%	4.79%	6.38%	3.71%	173	154	128	64	8.66%	4.79%	6.38%	3.71%	127	128	119	62
Texas: Lonestar 529 Plan	Balanced Portfolio	Advisor	11.54%	4.73%	5.56%	NA	65	155	140	NA	10.54%	4.73%	5.56%	NA	91	131	135	NA
Alaska: John Hancock Freedom 529	Multimanager Lifestyle Balanced 529 Portfolio	C2	10.76%	4.68%	6.51%	3.72%	117	156	126	63	10.76%	4.68%	6.51%	3.72%	74	134	117	61
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 2 (Ages 9-10) (previously Age-Based 7-10)	A	13.68%	4.55%	6.71%	3.49%	3	157	123	67	7.43%	2.60%	5.51%	2.90%	141	166	136	74
West Virginia: The Hartford SMART529	SMART529 Age-Based Portfolio 10-11	E	11.74%	4.52%	6.52%	3.85%	53	158	125	61	11.74%	4.52%	6.52%	3.85%	28	138	116	60

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.

Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC



Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Oklahoma: Oklahoma Dream 529 Plan	Age-Based 9-11	A	12.76%	4.28%	6.19%	NA	21	159	135	NA	7.97%	2.78%	5.27%	NA	134	164	139	NA
West Virginia: The Hartford SMART529	SMART529 Age-Based Portfolio 10-11	A	11.46%	4.27%	6.25%	3.60%	69	160	134	65	5.33%	2.32%	5.06%	3.01%	165	167	142	71
Iowa: IAdvisor 529 Plan	IAdvisor 529 Moderate	C	7.95%	4.25%	NA	NA	180	161	NA	NA	6.95%	4.25%	NA	NA	149	143	NA	NA
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 2 (Ages 9-10) (previously Age-Based 7-10) SD-C		13.34%	4.23%	6.39%	3.18%	6	162	127	70	12.34%	4.23%	6.39%	3.18%	14	144	118	66
Connecticut: Connecticut Higher Education Trust (CHET) -- Advisor Plan	CHET Advisor Age-Based Portfolio 10-11	C	11.20%	4.05%	6.26%	NA	88	163	133	NA	10.09%	4.05%	6.26%	NA	102	148	123	NA
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 2 (Ages 9-10) (previously Age-Based 7-10) C		12.82%	3.77%	5.90%	2.70%	19	164	138	78	11.82%	3.77%	5.90%	2.70%	23	155	130	77
West Virginia: The Hartford SMART529	SMART529 Age-Based Portfolio 10-11	B	10.86%	3.68%	5.67%	3.03%	109	165	139	72	5.32%	2.63%	5.24%	3.03%	166	165	140	69
Oklahoma: Oklahoma Dream 529 Plan	Age-Based 9-11	C	11.92%	3.50%	5.39%	NA	45	166	142	NA	10.92%	3.50%	5.39%	NA	65	157	138	NA
West Virginia: The Hartford SMART529	SMART529 Age-Based Portfolio 10-11	C	10.60%	3.47%	5.45%	2.83%	129	167	141	75	9.50%	3.47%	5.45%	2.83%	112	159	137	75
New York: New York's 529 College Savings Program -- Direct Plan	Aggressive Age-Based Portfolio: Blended Growth (11- NL		NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Rhode Island: CollegeBound Saver (Direct-sold)	Moderate Growth Portfolio	NR	10.63%	NA	NA	NA	127	NA	NA	NA	10.63%	NA	NA	NA	83	NA	NA	NA
Michigan: MI 529 Advisor Plan	Age-Based 9-10	A	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Michigan: MI 529 Advisor Plan	Age-Based 9-10	C	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Arkansas: iShares 529 Plan	iShares Moderate Portfolio (ETF)	L	8.56%	NA	NA	NA	175	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Nevada: The Vanguard 529 Savings Plan	Vanguard 60% Stock/40% Bond Portfolio	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Mississippi: Mississippi Affordable College Savings (MACS) Program	Moderate Allocation Option	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Arkansas: iShares 529 Plan	iShares Moderate Portfolio (ETF)	A	5.72%	NA	NA	NA	181	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Vermont: Vermont Higher Education Investment Plan	Balanced Portfolio	NL	10.44%	NA	NA	NA	138	NA	NA	NA	10.44%	NA	NA	NA	95	NA	NA	NA
Vermont: Vermont Higher Education Investment Plan	Age Band 3 (8-11 Years)	NL	9.78%	NA	NA	NA	154	NA	NA	NA	9.78%	NA	NA	NA	107	NA	NA	NA
Alaska: John Hancock Freedom 529	Multimanager Lifestyle Balanced 529 Portfolio	F	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
District of Columbia: DC College Savings Plan	DC College Savings 2031 Portfolio	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Rhode Island: CollegeBound 529 (Advisor-sold)	Invesco Moderate College Portfolio	RA	9.35%	NA	NA	NA	161	NA	NA	NA	9.35%	NA	NA	NA	115	NA	NA	NA

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.  
Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC





Investment Performance Rankings as of September 30, 2016  
60% Equity Portfolios ranked by: 3 Yr performance, no sales charges

Program	Portfolio	Class	No sales charges								Maximum sales charges							
			Average Total Return				Return Rank				Average Total Return				Return Rank			
			1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr	1 yr	3 yr	5 yr	10 yr
Montana: Achieve Montana	Moderate Portfolio	NL	10.04%	NA	NA	NA	149	NA	NA	NA	10.04%	NA	NA	NA	104	NA	NA	NA
Rhode Island: CollegeBound 529 (Advisor-sold)	Invesco Moderate College Portfolio	C	8.38%	NA	NA	NA	176	NA	NA	NA	7.38%	NA	NA	NA	143	NA	NA	NA
Rhode Island: CollegeBound 529 (Advisor-sold)	Invesco Moderate College Portfolio	I	9.45%	NA	NA	NA	160	NA	NA	NA	9.45%	NA	NA	NA	113	NA	NA	NA
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 3 (Age 11)	A	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Illinois: Bright Start Direct-Sold College Savings Program	Balanced Portfolio	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Illinois: Bright Start Direct-Sold College Savings Program	Index Balanced Portfolio	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Rhode Island: CollegeBound Saver (Direct-sold)	Moderate Growth Portfolio	RI	10.82%	NA	NA	NA	111	NA	NA	NA	10.82%	NA	NA	NA	68	NA	NA	NA
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 3 (Age 11)	C	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Connecticut: Connecticut Higher Education Trust (CHET)	Aggressive Managed Allocation Option: Age Band 13-	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 3 (Age 11)	SD-A	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
South Dakota: CollegeAccess 529 (Advisor-sold)	Age-Based 3 (Age 11)	SD-C	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Rhode Island: CollegeBound 529 (Advisor-sold)	Invesco Moderate College Portfolio	AR	8.58%	NA	NA	NA	174	NA	NA	NA	7.58%	NA	NA	NA	140	NA	NA	NA
Rhode Island: CollegeBound 529 (Advisor-sold)	Invesco Moderate College Portfolio	A	9.26%	NA	NA	NA	162	NA	NA	NA	4.92%	NA	NA	NA	169	NA	NA	NA
South Dakota: CollegeAccess 529 (Direct-sold)	Age-Based 3 (Age 11)	SD-D (NL)	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Rhode Island: CollegeBound 529 (Advisor-sold)	Invesco Moderate College Portfolio	RZ	9.65%	NA	NA	NA	156	NA	NA	NA	5.29%	NA	NA	NA	167	NA	NA	NA
Kentucky: Kentucky Education Savings Plan Trust	Age Band 9-10	NL	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Idaho: Idaho College Savings Program (IDeal)	Blended Growth Portfolio	NL	10.89%	NA	NA	NA	108	NA	NA	NA	10.89%	NA	NA	NA	66	NA	NA	NA

NA = Not Applicable = Portfolio does not have sufficient history

The performance data shown represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance presented here. A plan portfolio's investment return and principal value will fluctuate so that an investor's shares or units, when redeemed, may be worth more or less than their original cost. Investors should carefully consider plan investment goals, risks, charges and expenses, by obtaining and reading the plan's official program description, before investing. Investors should also consider whether their or their beneficiary's home state offers any tax or other benefits that are available for investments only in such state's 529 plan.

The investment performance data shown here is compiled from sources believed to be accurate. However, this should not be construed as official data and you are strongly advised to rely on official performance data available directly from the 529 programs.  
Brokers please note: For internal use only and not for use with or to be shown to the investing public.

Disclaimer: Savingforcollege.com shall not be liable for any errors or omissions in this report. Users should rely on official program disclosures.  
Copyright © 2017 Saving For College, LLC