



Plan Composite Performance Rankings as of December 31, 2023

RIA channel 529 Plans

Ranked by 5 Yr performance

The Savingforcollege.com Plan Composite Rankings are derived using the plans' relevant portfolio performance in seven unique asset allocation categories. The asset allocation categories used are 100% Equity, 80% Equity, 60% Equity, 40% Equity, 20% Equity, 100% Fixed, and 100% Short Term. The plan composite ranking is determined by the average of its performance score in the seven categories.

Rank	Plan	Performance Score
1	Virginia: CollegeAmerica (Class 529-F-2)	35.25
2	Nevada: Putnam 529 for America (Class Y)	37.78
3	South Carolina: Future Scholar 529 College Savings Plan (Class I)	40.95
4	New Hampshire: Fidelity Advisor 529 Plan (Class I)	43.81
5	Wisconsin: Tomorrow's Scholar 529 Plan (Class W)	45.30
6	New York: New York's 529 Advisor-Guided College Savings Plan (Advisor Class)	45.93
7	Kansas: Schwab 529 College Savings Plan	48.74
8	Alaska: John Hancock Freedom 529 (Class F)	53.59
9	Alabama: CollegeCounts 529 Fund Advisor Plan (Class F)	57.25
10	West Virginia: The Hartford SMART529 (Class E)	60.68
11	Arkansas: Brighter Future Advisor Plan (Class F)	61.15
12	Rhode Island: CollegeBound 529 (Class I)	63.71
13	Illinois: Bright Directions Advisor-Guided 529 College Savings Program (Class F)	66.56
-	Arizona: The Goldman Sachs 529 Plan (Class I)	NA
-	Colorado: Scholars Choice Education Savings Plan (Class I)	NA
-	Connecticut: CHET Advisor 529 College Savings Program (Class I)	NA
-	Indiana: CollegeChoice Advisor 529 Savings Plan (Class I)	NA
-	Michigan: MI 529 Advisor Plan (Class I)	NA
-	Nebraska: Nebraska Education Savings Trust -- Advisor College Savings Plan (Class F)	NA
-	Nevada: Future Path 529 Plan (Class Z)	NA
-	New Jersey: Franklin Templeton 529 College Savings Plan (Advisor Class)	NA
-	New Mexico: Scholar's Edge (Class R)	NA
-	North Carolina: Morgan Stanley National Advisory 529 Plan	NA
-	Ohio: BlackRock CollegeAdvantage Advisor 529 Savings Plan (Class I)	NA
-	Oklahoma: Oklahoma Dream 529 Plan (Class I)	NA
-	Oregon: MFS 529 Savings Plan (Class I)	NA
-	South Dakota: CollegeAccess 529 (Advisor-sold) (Class F)	NA
-	Texas: LoneStar 529 Plan (RIA)	NA

NA = Not Applicable = Program does not have at least one portfolio with sufficiently long performance in a minimum of four asset allocation categories under our ranking model.

The performance data underlying these rankings represents past performance and is not a guarantee of future performance. Current performance may be lower or higher than the performance data used. 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.

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

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