529 PRO

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THE INDUSTRY UTILITY FOR SERVICING 529 PLANS

Enrollments, Transactions, & Inquiries via Internet, Files or Paper ↔

Contribution Transactions via Internet, Files or Paper ↔
ACH, **Lockbox, Payroll** and **NSCC** contribution types supported

Disbursement Requests and Payments via Internet, Files or Paper ↔

Principal Review via Internet →

Data Repair, Service Inquiries, Reports, & Files via Internet or Paper ↔

Presentation & Business Rule Layer

Statements, Confirmations & Tax Forms for Shareholders ←

Lead/Trail Commission Payments/Reporting for Financial Advisors ←

Direct NSCC Trades for Brokers →

Reports for Operations Staff ←

TA Record Keeping Layer