

## **Terms and Conditions**

**Offer Description:** The ScholarShare 529 College Savings Plan (“ScholarShare 529”) is a 529 college savings plan administered by the ScholarShare Investment Board (“SIB”), an instrumentality of the state of California, and managed by TIAA-CREF Tuition Financing, Inc. (“TFI”). To receive a \$25 bonus deposit (“the Bonus Deposit”), eligible individuals must (a) open a new ScholarShare 529 account (for a new beneficiary) online at [www.ScholarShare529.com](http://www.ScholarShare529.com) between June 1, 2024 at 12:01 AM Pacific Time (PT) and August 31, 2024 at 8:59 PM PT with an initial deposit of at least \$250 to be contributed and invested at the time the new ScholarShare 529 account is opened, and (b) enter the Promotional code, Summer25 in the Promotion Code field of the online account opening application. Offer limited to accounts opened online. The initial \$250 deposit must be received within 10 business days after the account is established. The Bonus Deposit will be made to the eligible ScholarShare 529 account on or before 8:59 PM PT on September 30, 2024. Limit: one (1) Bonus Deposit per new ScholarShare 529 account per unique accountholder/beneficiary combination.

**Eligibility:** Offer open to legal residents of the 50 states of the United States who are at least 18 years of age or older as of June 1, 2024 and have a social security number or federal taxpayer identification number and excludes the following: (a) members, officers, and employees of SIB; TFI and its parent, subsidiaries, affiliates, owners, members, directors, managers, officers, employees, trustees, agents; and their respective immediate family members (spouse, domestic partner, parents, legal guardians, grandparents, grandchildren, siblings, children and “step” of each) and those individuals living in their same household; and (b) FINRA affiliated customers. All taxes and other costs associated with this promotion are solely the responsibility of the recipient and/or beneficiary. Beneficiary for the new ScholarShare 529 account cannot be a beneficiary of an existing ScholarShare 529 account for that account owner.

**Miscellaneous:** TFI and SIB (the “Sponsors”) are not responsible for errors, omissions, interruptions, deletions, defects, or delays in operation or transmission of information, in each case whether arising by way of technical or other failures or malfunctions or computer hardware or software, communications devices, data corruption, theft, unauthorized access to or alteration of offer materials, or otherwise. Sponsors reserve the right (a) to modify, suspend, or terminate this offer should any technical failure, unauthorized human intervention, or other causes beyond Sponsors’ reasonable control corrupt or adversely affect the security, administration, or proper conduct of this offer; and (b) to disqualify any individual who tampers with the offer process. To receive the Bonus Deposit, the ScholarShare 529 account must be open with a dollar balance greater than zero on the day the Bonus Deposit is made.

\*NOTE: This promotion is offered on a first come first served basis for a limited time, and the Sponsors have the right to withdraw and otherwise terminate the offer at any time during the promotion period.

**To learn more about California's ScholarShare 529, its investment objectives, risks, charges and expenses see the Plan Description at [ScholarShare529.com](http://ScholarShare529.com). Read it carefully. Investments in the Plan are neither insured nor guaranteed and there is the risk of investment loss. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, is the distributor and underwriter for ScholarShare 529. Check with your home state to learn if it offers tax or other benefits such as financial aid, scholarship funds or protection from creditors for investing in its own 529 plan.**

TIAA-CREF Tuition Financing, Inc. (TFI), Plan Manager. TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the California 529 College Savings Plan.