

2023 OKLAHOMA 529 Holiday Promotion
TERMS & CONDITIONS

PROMOTION TIMING: Oklahoma 529/TIAA-CREF Tuition Financing, Inc. (TFI) Holiday Promotion (the “Promotion”) begins on 11/20/23 at 12:01 AM Central Time (CT) and ends on 12/15/23 at 10:59 PM Central Time (CT) (the “Promotion Period”).

PROMOTION SPONSOR AND ADMINISTRATOR: TIAA-CREF Tuition Financing, Inc. (TFI) (“Sponsor”)

PROMOTION DESCRIPTION:

To receive a \$50 promotion deposit (“the Promotion Deposit”), eligible individuals must (a) open a new Oklahoma 529 account (for a new unique Account Owner/Beneficiary combination) online during the Promotion Period with an initial deposit of at least \$250 to be contributed and invested at the time the new account is opened and (b) establish a recurring contribution (from a bank account or by payroll direct deposit) for the new account of at least \$50 per month, and shall be maintained at minimum through 11:59 PM CT on June 30, 2024. The Promotion Deposit will be made to the eligible account on or before August 15, 2024.

To receive a \$100 promotion deposit (“the Promotion Deposit”), eligible individuals must: a) open a new Oklahoma 529 account (for a new unique Account Owner/Beneficiary combination) online during the Promotion Period with an initial deposit of at least \$500 to be contributed and invested at the time the new account is opened and (b) establish a recurring contribution (from a bank account or by payroll direct deposit) for the new account of at least \$100 per month, and shall be maintained at minimum through 11:59 PM CT on June 30, 2024. The Promotion Deposit will be made to the eligible account on or before August 15, 2024.

Limit: Only one Matching Deposit per new Oklahoma 529 account per beneficiary. Void where prohibited or restricted by law.

ELIGIBILITY: Promotion open to legal residents of the 50 United States who are at least 18 years of age or older as of November 20, 2023 and have a social security number or federal taxpayer identification number. To receive the Matching Deposit, the Oklahoma 529 account must be open with a dollar balance greater than zero on the day the Matching Deposit is made. The following are excluded: (a) members, officers, and employees of the Oklahoma Office of the State Treasurer, 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 the Promotion are solely the responsibility of the recipient and/or beneficiary.

MISCELLANEOUS: The Sponsor is 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 Promotion materials, or otherwise. Sponsors reserve the right (a) to modify, suspend, or terminate this Promotion 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 Promotion; and (b) to disqualify any individual who tampers with the Promotion process.

Consider the investment objectives, risks, charges and expenses before investing in a state 529 college savings plan. Carefully read the Plan Description available on oklahoma529.com.

Investments in a state 529 college savings plan are neither insured nor guaranteed and there is risk of investment loss.

TIAA-CREF Individual & Institutional Services, LLC, Member FINRA, distributor and underwriter for the Oklahoma 529.