my529®
UTAH'S EDUCATIONAL SAVINGS PLAN

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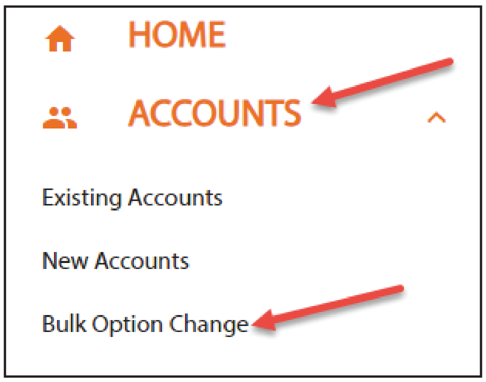
Bulk Option Change

Instructional Guide

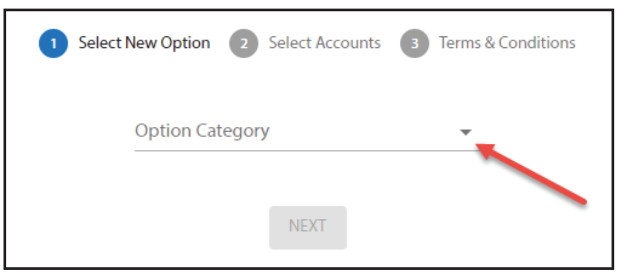
It is now faster and simpler to change the investment option for multiple clients. You can change the investment option for more than one account at the same time with our Bulk Option Change feature within your Advisor Access.

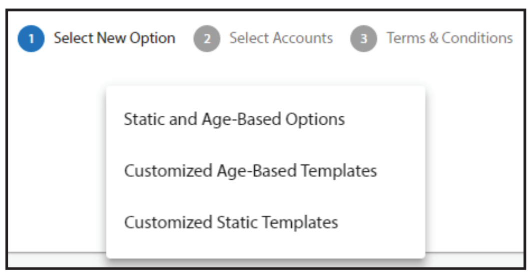
Step 1—Log in to Advisor Access at advisor.my529.org.

Step 2—From the menu icon in the top left corner, click **Accounts** and select **Bulk Option Change**.

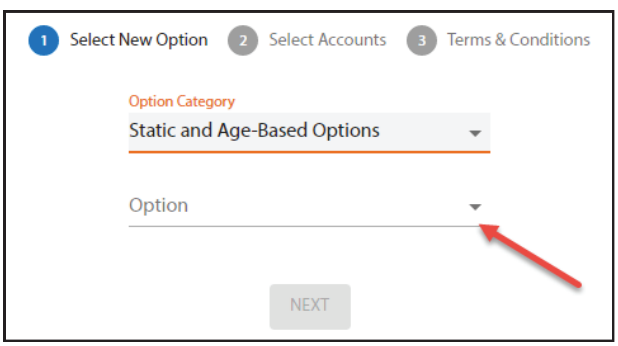


Step 3—Select the option category from the drop-down menu. If you have previously created and saved Customized Age-Based or Customized Static templates, those categories will appear in the drop-down menu.





Step 4—Select the new option and click **Next**. All available investment options within the category you selected in Step 3 will be displayed in the drop-down menu, including any saved customized templates, if applicable.



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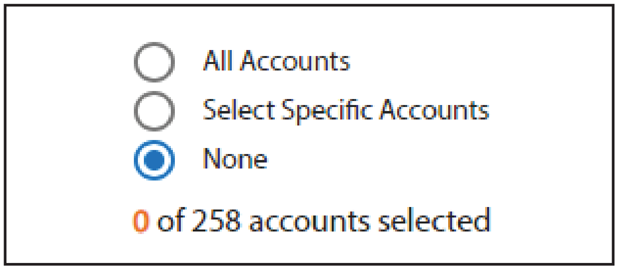
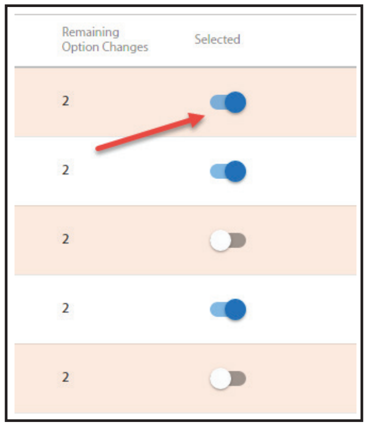
Step 5—Select the accounts you wish to include in the Bulk Option Change. You have the option of selecting all accounts, or manually selecting one or more. To add accounts manually, click **Select Specific Accounts** and toggle the switch to the right of the accounts to be included. Click **Next**.





- Note: Accounts are **excluded** from the Bulk Option Change if they meet any of the following conditions:
    - The account is already in the selected investment option
    - The account already has a pending option change
    - The account has already used its two allotted option changes for the year
    - The account is part of an account group (more than one account for the same account owner/beneficiary combination)

Step 6—The Terms and Conditions are displayed on the next screen. Acknowledge that you have read, understand and agree to the Terms and Conditions, and that you understand emails will be sent to the account owners for all included accounts by checking the boxes at the bottom of the page.

Step 7— Click **Submit**.