

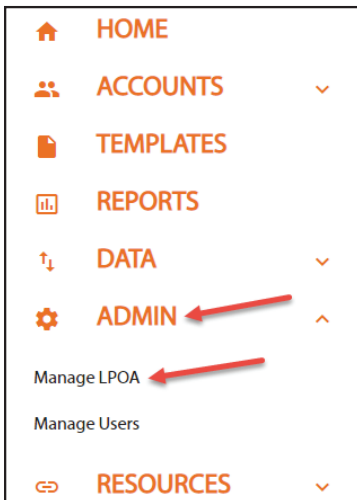
## Managing LPOA and User Settings

Now you can customize your firm's settings at my529 and the settings of individual users by assigning (or disallowing) permissions. That way, you can ensure that the right people have the right capabilities. Permissions can be allowed for transactional and administrative functions.

### Managing Firm Settings (Master Administrator Only)

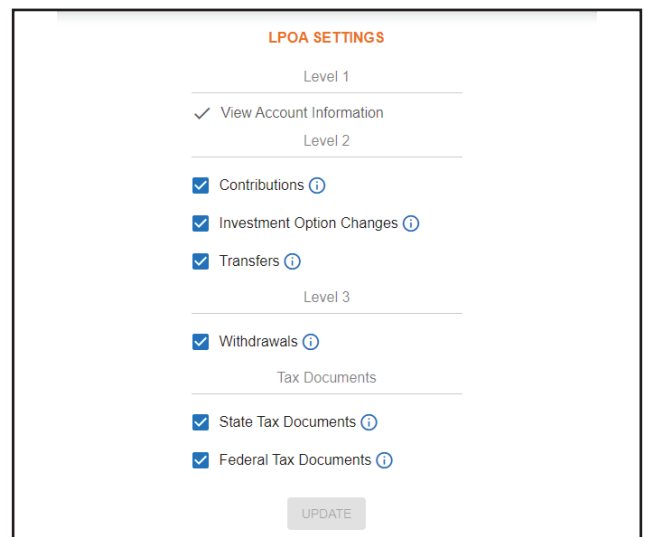
**Step 1**—Log in to Advisor Access at [advisor.my529.org](http://advisor.my529.org).

**Step 2**—From the menu icon in the top left corner, click **Admin** and select **Manage LPOA**.



**Step 3**—On this screen, the Master Administrator is able to turn permissions on or off for the entire firm. Click **Update** to save the settings. This screen is also where the Master Administrator is able to edit contact information for the firm.

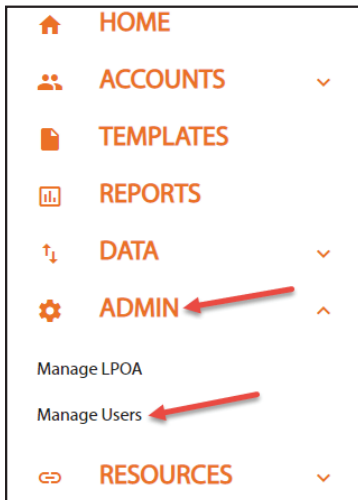
**Step 4**—All registered users can view the firm's permission settings by clicking on the down arrow next to their name in the top right corner and selecting **LPOA Settings**.



## **Adding New Users** (any user who has been granted the Create/Edit Users permission by the Master Administrator)

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

**Step 2**—From the menu icon in the top left corner, click **Admin** and select **Manage Users**.



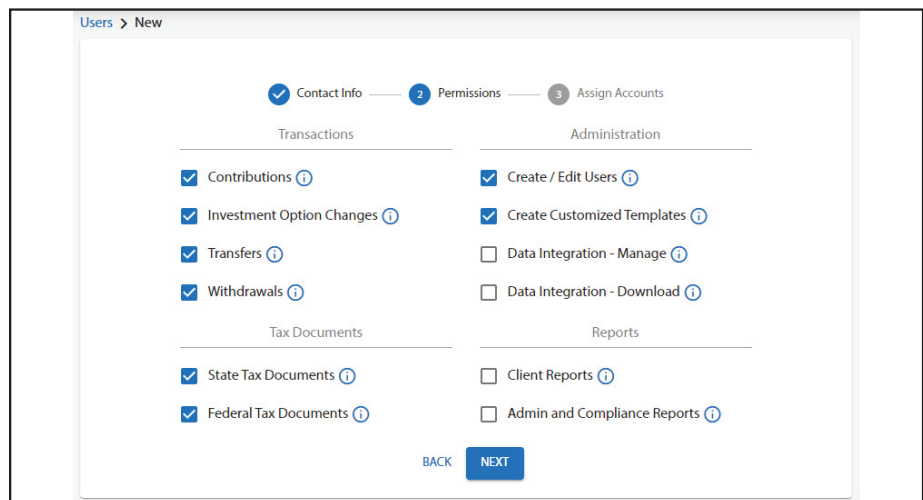
**Step 3**—Click the “+” icon in the lower right corner.

**Step 4**—Provide required information for the new user and click **Next**.

**Step 5**—Assign permissions you would like the user to have in each of the following categories:

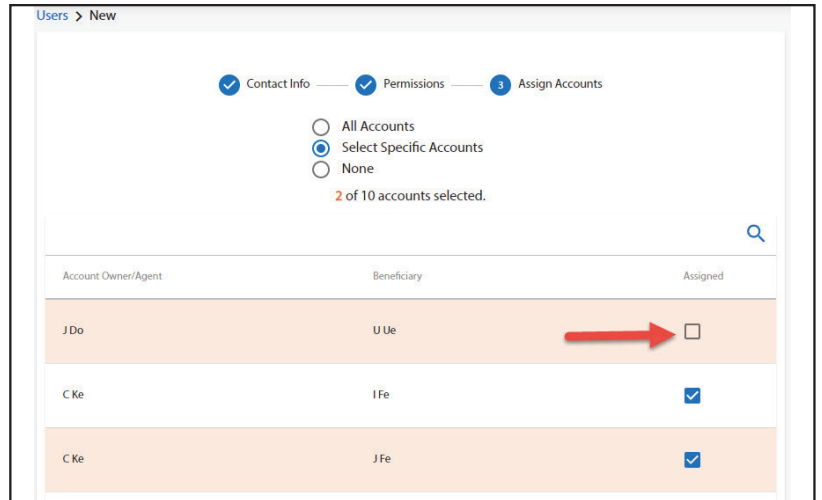
- Transactions
- Administration
- Tax Documents
- Reports

After you have made your selections, click **Next**.



**Step 6**—Assign accounts for which you would like this user to have access. You can select **All Accounts** or **Select Specific Accounts**.

- **All Accounts** – For this option, the user would have access to all existing accounts for your firm as well as any new accounts added going forward.
- **Select Specific Accounts** – Manually select the accounts for which you would like the user to have access by toggling the switch to the right of the account. New accounts going forward would also need to be added manually to this user's list of accounts.



**Step 7**— Click **Finish**.

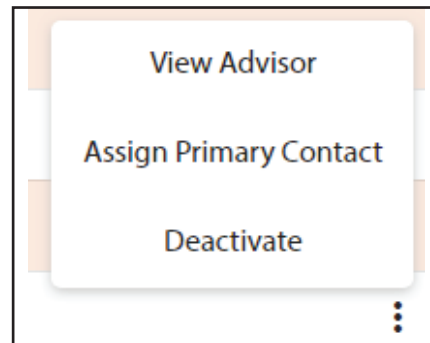
**Step 8**— A PIN is generated on the next screen, and you will need to provide the PIN to the new user. The new user will receive an email with a link to set up their login credentials. They will need the PIN to complete their registration. The PIN is also used to verify the identity of the user when the user calls our Operations team.

## **Managing Existing Users** (any user who has been granted the Create/Edit Users permission by the Master Administrator)

**Step 1**—Access the list of users from the menu icon in the top left corner by clicking **Admin** and selecting **Manage Users**.

**Step 2**—From the row menu icon (three dots at the right of each row), you can select from the following:

- a. View Advisor – from this page you can:
  - i. View and edit permissions assigned to the user.
  - ii. Edit the list of accounts for which the user has access.
  - iii. Edit contact information for the user.
  - iv. View the user's PIN.
  - v. View my529 Username (Master Administrator only).
- b. Assign Primary Contact – Select accounts for which you would like the user to be the primary contact. This is the person my529 would call first with any questions related to the account.
- c. Deactivate – remove any users who are either no longer with the firm or who should no longer have access to client accounts.



**Step 3**—After making any changes, be sure to click **Save**. For the **View Advisor** page, the save function is in the arrow icon at the lower right corner of the page. For the **Assign Primary Contact** page, the **Save** button is at the bottom of the list of accounts.

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*Investing is an important decision. Read the Program Description in its entirety for more information and consider all investment objectives, risks, charges, and expenses before investing. Call 800.418.2551 for a copy of the Program Description or visit my529.org.*

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*The state in which you or your beneficiary pays taxes or lives may offer a 529 plan that provides state tax or other benefits, such as financial aid, scholarship funds, and protection from creditors, not otherwise available to you by investing in my529. You should consider such benefits, if any, before investing in my529.*

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