The DreamAhead College Investment Plan is sponsored and distributed by the Washington Student Achievement Council. Sunday Administration, LLC, a BNY Mellon Company, provides program management, recordkeeping and administrative support services. Investment options include year of enrollment portfolios and static investment portfolios.

### 5-Cap Rating

| Resident: | | |
| Non-Resident: | | |

Savingforcollege.com's 5-Cap Ratings provides an evaluation and comparison of 529 plans, utilizing a formula that examines dozens of factors grouped into the following categories. (Scale 0 to 5; 5 is highest)

<table>
<thead>
<tr>
<th>Performance</th>
<th>Costs</th>
<th>Features</th>
<th>Reliability</th>
<th>Resident Upgrade</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.62</td>
<td>4.44</td>
<td>3.39</td>
<td>4.76</td>
<td>0.63</td>
</tr>
</tbody>
</table>

### Investment Options

**Age-based/Enrollment Year investment options:**
The Year of Enrollment Option is offered in 3 risk levels (Conservative, Moderate, or Growth), each containing 10 Year of Enrollment Portfolios in 2 year increments. Year of Enrollment Portfolios are designed to evolve over time to transition from a heavier allocation to underlying funds that invest in equities (stocks) in earlier years to a more conservative underlying funds that invest in fixed income (bonds) and money market instruments (cash preservation) as the beneficiary approaches college age.

**Static investment options:**
Select among seven static investment options.

**Underlying investments:**
Fidelity, JPMorgan, Schwab, Vanguard

### Taxes and other Benefits

**Program match on contributions:**
None

**State tax deduction or credit for contributions:**
Not applicable. Washington does not have a personal income tax.

**State definition of qualified expenses**
The state conforms with the federal definition of qualified education expenses, which includes expenses for higher education, as well as up to $10,000 per year in tuition in connection with enrollment or attendance at an elementary or secondary public, private, or religious school.

**Is there a rewards program or outside scholarship program that works with this program?**
Yes, the Upromise Rewards program can be linked to any 529 college savings plan. Upromise Rewards is free to join and offers members cash back for college.

## Plan Portfolios

There is no investment data available for this plan. Please visit [http://www.dreamahead.wa.gov/](http://www.dreamahead.wa.gov/) for additional information.