

QUALIFIED EXPENSES FOR YOUR 529 PLAN



K-12

A 529 Plan will cover up to \$20K per year for K-12.

- Tuition
- Curriculum and curricular materials
- Books and instructional materials
- Tutoring
- Standardized testing fees
- College entrance exam fees
- Special needs services

College Undergrad & Graduate

- Tuition
- Room and board
- Required books, supplies, and equipment
- Special needs services



Vocational School & Continuing Education

- Tuition and fees
- Required books, supplies, and equipment

Vocational schools can include trade school, technical school, career college or community college. Career training and continuing education can include dental hygiene, radiologic technology, construction management or plumbing.

Apprenticeships & Other Covered Expenses

- Tuition and fees
- Required tools and equipment
- Repayment of student loans*

**\$10K of beneficiary's student loans plus \$10K for siblings' student loans*



Note: Certain restrictions may apply. The examples discussed above are for illustrative purposes only and do not represent an exhaustive list of the types of courses for which tuition may be financed using a 529 Education Savings Plan. For more details, discuss with the educational institution directly.