

ADITYA KAMBHAMPATI OWNER
RIHAAN T KAMBHAMPATI BENEFICIARY
6857 HUNTS MESA DR
INDIAN LAND SC 29707-2553

Annual Statement

January 1, 2023 - December 31, 2023

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Account Number 2085574

Contact Future Scholar

Customer Service: 888.244.5674
On the Internet: futurescholar.com
By Mail: Future Scholar 529 Plan
P.O. Box 219812
Kansas City, MO 64121-9812

Important Message:

Did you know you can have your statements and other compliance documents delivered online? www.futurescholar.com to log in. From the Portfolio Summary page, select My Profile then eDelivery and follow steps to setup electronic delivery.

Your Account Summary

Beneficiary: Rihaan T Kambhampati

Earnings Portion of Current Balance **-\$0.01**
As of December 31, 2023

Change in Account Value

Account Value on January 1, 2023	\$0.00
Additions	\$10,000.00
Subtractions	\$0.00
+/- Change in Value	-\$0.01
Account Value as of December 31, 2023	\$9,999.99

Update Your Bank Account Information

The fastest and easiest way to receive funds from your Future Scholar account is to have the funds deposited into your personal bank account. From there, you can electronically submit a payment to the school or simply reimburse yourself for funds you have already expended. As long as the funds you are withdrawing are being used to pay for qualified educational expenses, there will be no tax implications for the withdrawal.

Log in to your account today at FutureScholar.com and select "My Profile" to make sure the bank account you have on file is accurate and up to date.

Compensation to brokers for sales or other services is disclosed in the Program Description.

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ACCOUNT PERFORMANCE AS OF 12-31-23

Since Inception (12/29/2023)	QTD	YTD	3-Year	5-Year
0.00%	0.00%	0.00%	N/A	N/A

The results above are based on the performance of your individual investments, along with the timing and amount of your purchases and redemptions. It may differ considerably from the performance of the investment option(s).

The Plan uses the modified Dietz method, a time-weighted method, to determine your account performance. Accounts with a zero balance at either the beginning or end of the time period shown will not calculate a personal rate of return and will show a zero return.

Past performance is not a guarantee of future investment results for your account or of any investment option.

ACCOUNT VALUE

Portfolio Name Portfolio - Account Number	Beginning Balance	+	Additions	-	Subtractions	+/-	Change in Value	=	Ending Balance
FS LARGE CAP INDEX PORTFOLIO 2406-2085574	\$0.00		\$10,000.00		0.00		-\$0.01		\$9,999.99
Total Value	\$0.00		\$10,000.00		\$0.00		-\$0.01		\$9,999.99

CONTRIBUTIONS

Portfolio Name Portfolio - Account Number	Year-to-Date Prior Year	Year-to-Date Current Year	Year-to-Date	Since Inception
FS LARGE CAP INDEX PORTFOLIO 2406-2085574	\$0.00	\$10,000.00	\$10,000.00	\$10,000.00
Total Value	\$0.00	\$10,000.00	\$10,000.00	\$10,000.00

TRANSACTIONS THIS PERIOD

Confirm Date	Trade Date	Description of Transaction	Dollar Amount	Share Price	Shares	Total Shares(s) Owned
FS LARGE CAP INDEX PORTFOLIO 2406-2085574						
BEGINNING VALUE ON 01/01/2023			\$0.00	\$47.30		0.000
12/29/23	12/29/23	CONTRIBUTION - ACH	\$10,000.00	\$59.61	167.757	167.757
ENDING VALUE ON 12/31/2023			\$9,999.99	\$59.61		167.757

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Important Notices

Year-end Tax Information:

If distributions were made from your Future Scholar 529 account in Calendar Year 2023, your IRS Form 1099-Q is scheduled to be mailed by January 31, 2024. If you are a registered user of futurescholar.com you will be able to view your tax forms online shortly after the scheduled mail date. Please be advised that tax forms are not produced for contributions to 529 accounts. Refer to your account statement for contribution activity.

There's still time to make your 2023 529 contribution!

Contributions and rollover contributions postmarked by April 15, 2024, can be designated for tax year 2023 for SC state income tax purposes. You must clearly indicate prior year contribution on your check, Contribution Form, online or over the phone. If no designation is made, your contribution will be allocated for the 2024 tax year. Contact your financial advisor or call a Columbia Threadneedle Investments client service representative.

Annual Financial Statements for the Future Scholar 529 Plan Direct Program are available at <https://futurescholar.com/media/1359/529-direct-plan-final.pdf>. You can view online, download a copy or order a printed copy to be mailed to you at no charge. If you have questions or require assistance please contact Columbia Threadneedle Investments at 1-888-244-5674.

Shares of the portfolio(s) identified on this statement are municipal fund securities. Qualified Account withdrawals including investment gains will generally not be subject to federal income tax as described in Section 529 of the Internal Revenue Code. We make no representation as to state tax treatment. The portfolio is not rated. This statement reflects purchase, redemption or other financial transaction activity. Carefully review all of the information to verify the accuracy of the transactions. Please notify us immediately if there is an error. If you fail to notify us of an error within 60 days of the transaction, you will be deemed to have ratified each transaction. The value of your account is not guaranteed by the state of South Carolina or any other government entity or financial institution.

The Direct Plan is sold directly by the program and is limited to a specific group of investors, as described in the program description. You may also participate in the Advisor Plan, which is sold exclusively through financial advisors. The Advisor Plan offers additional investment choices, but the fees and expenses are higher. Please contact your financial advisor for additional information on the Advisor Plan. The Office of State Treasurer of South Carolina (the State Treasurer) administers the Program and has selected Columbia Management Investment Advisers, LLC. (CMIA) as Program Manager. CMIA and its affiliates are responsible for providing certain administrative, recordkeeping and investment services, and for the marketing of the Program. CMIA is not affiliated with the State Treasurer.

Advanced Gifting

Individuals may contribute up to five-times the annual federal gifting exclusion (\$17,000 for 2023, \$18,000 for 2024) in a single year to a 529 Account. This allows for a maximum \$85,000 for 2023 or \$90,000 in 2024 (\$170,000 in 2023 or \$180,000 in 2024 for spouses filing jointly) without incurring gift tax, provided the contributor(s) does not give additional gifts to the designated beneficiary during the five-year period. Contact your financial advisor or qualified tax professional to ensure that you are meeting IRS requirements.

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Important Notices continued

eGift

Future Scholar is proud to offer eGift, a secure online gifting feature! eGift is a secure way to invite family and friends to celebrate occasions in your beneficiary's life by making contributions to your Future Scholar account. Log in now to learn more and start using eGift today!