



**PA 529 Investment Plan**  
P.O. Box 55378  
Boston, MA 02205-5378

# Account Statement

of 4

**Statement Period:** 01/01/2023 - 12/31/2023

<b>Account Beginning</b>	<b>\$2,080.82</b>
Change in Value	\$903.69
<b>Account Ending</b>	<b>\$2,984.51</b>
Principal	\$2,700.00
Earnings	\$284.51

Rajasekhar Rao Kotari  
775 Barn Swallow Way  
Mechanicsburg, PA 17055

**PA 529 IP EARNED FIRST EVER MORNINGSTAR™ GOLD RATING!** The PA 529 Investment Plan (IP) received its first ever Morningstar Gold Rating in 2023, standing out as one of the best plans rated by the financial services company. Morningstar cited Treasury’s effective advocacy on behalf of account owners, increased outreach and accessibility efforts, and a reduction of plan fees in its review. It went on to say the PA 529 IP “should remain a top choice for anyone saving for educational costs.” You can read more about this exciting news at [pa529.com](http://pa529.com)!

**PA STATE INCOME TAX DEDUCTION INCREASES FOR TAX YEAR 2024.** Pennsylvania taxpayers can deduct \$ 8,000 (\$36,000 for married couples) from PA state income taxes for PA 529 contributions made in tax year 2024. This amount is based on the federal annual exclusion for gifts, which increases to \$ 8,000 for calendar year 2024 (up from \$ 7,000). Don’t forget to deduct your PA 529 contributions on your 2023 Pennsylvania income tax return.

**Beneficiary:** Ameyaa Kotari **Account #:** 575 99 -0  
**Account Type:** Individual 529

## STATEMENT SUMMARY

	Quarterly Totals	Year-to-Date Totals
<b>Current Year Contributions - All Sources</b>	\$600.00	\$2,700.00

## INVESTMENT SUMMARY

Portfolio Name	Units	Unit Price	Value
Aggressive Growth Portfolio	44.8607	\$33.03	\$ ,48 .75
Total Stock Market Index Portfolio	33.4 70	\$44.97	\$ ,502.76
<b>Total:</b>			<b>\$2,984.51</b>

## INVESTMENT TRANSACTIONS

January 01, 2023 - December 31, 2023

Trade Date	Transaction Description Portfolio Name	Units Transacted	Unit Price	Transaction Amount
1/30/2023	2023 Contribution AIP Aggressive Growth Portfolio	4.7786	\$3 .39	\$ 50.00

**INVESTMENT TRANSACTIONS (continued)**

Trade Date	Transaction Description Portfolio Name	Units Transacted	Unit Price	Transaction Amount
/30/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.52	\$42.7	\$ 50.00
01/31/2023	2023 Contribution AIP Aggressive Growth Portfolio	5.2083	\$28.80	\$ 50.00
01/31/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.842	\$39.05	\$ 50.00
09/29/2023	2023 Contribution AIP Aggressive Growth Portfolio	5.0522	\$29.69	\$ 50.00
09/29/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.7397	\$40.	\$ 50.00
08/31/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.5604	\$42.3	\$ 50.00
08/31/2023	2023 Contribution AIP Aggressive Growth Portfolio	4.8403	\$30.99	\$ 50.00
07/31/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.4908	\$42.97	\$ 50.00
07/31/2023	2023 Contribution AIP Aggressive Growth Portfolio	4.6963	\$3.94	\$ 50.00
06/30/2023	2023 Contribution AIP Aggressive Growth Portfolio	4.870	\$30.80	\$ 50.00
06/30/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.653	\$4.49	\$ 50.00
05/31/2023	2023 Contribution AIP Aggressive Growth Portfolio	5.546	\$29.0	\$ 50.00
05/31/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.8620	\$38.84	\$ 50.00
04/28/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.8780	\$38.68	\$ 50.00
04/28/2023	2023 Contribution AIP Aggressive Growth Portfolio	5.0968	\$29.43	\$ 50.00
03/31/2023	2023 Contribution AIP Aggressive Growth Portfolio	5.635	\$29.05	\$ 50.00
03/31/2023	2023 Contribution AIP Total Stock Market Index Portfolio	3.975	\$38.29	\$ 50.00

**ADDITIONAL INFORMATION**

**ACCOUNT SECURITY REMINDER:** The new year is a great time to ensure your PA 529 account is safe and secure. To protect your account from fraud, never give your account information to any other person and check your information regularly online or by phone. Use hard to guess passwords and change them frequently to keep your account protected.

**DISCLOSURES**

The Plan's portfolios, although they invest in Vanguard mutual funds, are not mutual funds. Investments are not guaranteed by the Federal Deposit Insurance Company (FDIC), the Investment Plan, the Commonwealth of Pennsylvania, or any other government or government agency, The Vanguard Group, Ascensus Broker Dealer Services, LLC or any of their affiliates. The value of your account will vary based on market conditions and the performance of the investment options you select, and may be more or less than what you deposit.

Before you invest, consider whether your or the beneficiary's home state offers any state tax or other state benefits such as financial aid, scholarship funds, and protection from creditors that are only available for investments in that state's qualified tuition program.

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