

# Upromise GoalSaver Account

Get motivated to reach your college savings goals

Open an account

Already have an account? Log in

Upromise GoalSaver is a free, FDIC-insured savings account that makes saving for college and related expenses simple. It helps you set, visualize, and track your progress, for one goal or several.

### How Upromise GoalSaver works



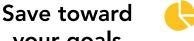
Set your goals

Set specific savings

goals and

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Set up automatic deposits from your hank account

your goals



Stay motivated with simple goal trackers. We'll even give you

## What you get with Upromise GoalSaver



#### 10% match



0.85% APY



No monthly fees

Get a 10% match on Upromise earnings transferred into your Upromise GoalSaver.

Get a rate that helps you reach your goals faster.<sup>3</sup>

Plus, you can start small with no minimum balance.

#### Have questions about the Upromise GoalSaver Account?

Call 877-978-1710

1 Federal Regulation D limits certain types of withdrawal and transfer transactions you can make from your Upromise GoalSaver Account to a maximum of six per monthly statement period per account. If you need to make more than six transfers in one monthly statement period, please call Upromise GoalSaver Support at 1-877-978-1710. For more information, please refer to **Upromise GoalSaver Terms and Conditions Agreement**.

2 Cash rewards will post to Upromise GoalSaver Account(s) in the form of interest payments and is subject to taxable income rules. Each cash reward program is subject to individual eligibility requirements:

10% Match on Upromise Rewards: To be eligible for the 10% annual match on your Upromise Rewards Account earnings, you must link your Upromise GoalSaver Account to your Upromise Rewards Account and either: 1. Within 90 days of opening your Upromise GoalSaver Account, make your first of at least 10 externally funded credit/deposit transactions into the Upromise GoalSaver Account and complete at least 10 externally funded credit/deposit transactions within the anniversary year or 2. Within 90 days of opening your Upromise GoalSaver Account, fund your Upromise GoalSaver Account with \$5,000 or more and maintain an average daily balance of \$5,000 or more during the 12 months from account opening. Should you fail to meet the requirements during the anniversary year, you will have the opportunity to become eligible for the 10% match in additional years if, by your anniversary date, you (a) link your Upromise GoalSaver Account to your Upromise Rewards Account, and (b), you either meet the \$5,000 average daily balance minimum funding requirement, or you meet the 10 externally funded credit/deposit requirement in the anniversary year. If you qualify for the 10% match based on having the average daily balance of \$5,000 in your Upromise GoalSaver Account, you must maintain that average balance in your Upromise GoalSaver Account for the duration of the anniversary year for which your transferred earnings will be matched. Once you complete the steps above, Upromise will match 10% of your Upromise earnings that you transfer from your Upromise Rewards Account into your Upromise GoalSaver Account during each anniversary year. Your match will be deposited into your Upromise GoalSaver Account within 60 days after your anniversary date,