

What are Aggregators?

Aggregators provide a service which allow users to pull together balance and activity information from different financial accounts into a single view.

How do Aggregators work?

Aggregators use a form of technology called data scraping. Data scraping is the process of extracting information from web sites. In this instance the computer from your aggregator service will login to your account using your personal security credentials to extract information from your web pages.

How do Aggregators access 529 online account balance and activity information?

In order for an aggregator provider to access your 529 online account, you the account owner must provide the service with your existing username and password in order for the aggregator to “scrape” data from your account screens.

How does Two Factor Authentication affect Aggregators accessing my 529 online account?

Essentially, use of 2FA will break aggregator access. This will happen because aggregators will not be able to use your existing login credentials to access the account as they have no way of receiving your PIN. We have a solution to this problem. Please sign into your account and create aggregator read-only log-in credentials.

What are Aggregator read-only credentials and how does this benefit me?

Aggregator read-only log-in credentials are for use by aggregators. The username and password is different from that of your 529 account. Once created, these new log-in credentials will allow you to continue to utilize your aggregator service. By using the aggregator read-only log-in credentials, the aggregator will no longer have your primary username, password, and your personal and sensitive information. The aggregator will only have access to the necessary information needed to create your financial view such as basic account and investment details along with account transactions.

Why is my Aggregator service no longer working?

Your aggregator service may no longer be working due to the following reasons:

*You have not created the read-only aggregator log-in credentials. To create your aggregator login credentials:

- o Log in to your account
- o Select "Profile & Documents"
- o Select "Password & Security Features"
- o Under "Manage Financial Aggregator Access," select "Edit"
- o Create password and copy the new URL
- o Visit your aggregation service provider to provide the new URL and login credentials so that the aggregator can continue to access your 529 account.

*You have not selected the correct aggregator URL for your 529 plan.

*Your aggregator service has not created a new URL for your 529 plan. If that is the reason your service is no longer working, please reach out to your aggregator service provider.