

NestFund — Starter Guide

This five minute guide helps you pick a first step and start small weekly deposits.

- 1) Learn the options: OGA, 529, UTMA or Roth IRA for minors.
- 2) Choose the account that fits your family.
- 3) Automate a weekly contribution, even ten dollars.

Locked facts:

- OGA eligibility: kids born on/after Jan 1, 2025.
- Growth is tax deferred (not tax free).
- At age 18, funds may roll into a Traditional IRA or be used for approved purposes.
- Show projections to age 60 when relevant.

Disclaimer: This is educational, not financial advice.