



# Account Statement

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Statement Period: 9/27/2024 - 12/31/2024

Account Ending	\$4,064.45
Principal	\$4,000.00
Earnings	\$64.45

Prasenjit Banerjee  
1704 FROST LN  
NAPERVILLE, IL 60564

**Reminder:** To review your cumulative 2024 contributions and withdrawals prior to the Program Manager transition on September 27, 2024, please refer to your statement(s) dated September 27, 2024. Your September 27, 2024 statement(s) and statements for prior periods are available when you log into your account at [www.brightstart.com](http://www.brightstart.com) and navigate to "View Profile and Documents" and then "Statements, Confirms and Tax Forms."

When entering contribution totals on the Illinois Tax Form 1040, Schedule M, it's important to exclude any gift contributions that were contributed to the Bright Start 529 account by individuals other than the taxpayer.

Account Owner: Prasenjit Banerjee  
Beneficiary: Heeya Banerjee

Account #: A97913352-02  
Account Type: Individual 529

## STATEMENT SUMMARY

	Quarterly Totals	Year-to-Date Totals
Current Year Contributions - All Sources	\$1,500.00	\$1,500.00

## INVESTMENT SUMMARY

Investment Portfolio(s)	Units	Unit Price	Value
Aggressive 2036/2037 Enrollment Portfolio	413.0536	\$9.84	\$4,064.45
Total:			\$4,064.45

## INVESTMENT TRANSACTIONS

September 27, 2024 - December 31, 2024

Trade Date	Transaction Description	Units Transacted	Unit Price	Transaction Amount
12/20/2024	Investment Portfolio(s) Recurring Contribution Aggressive 2036/2037 Enrollment Portfolio	50.7099	\$9.86	\$500.00
11/20/2024	Recurring Contribution Aggressive 2036/2037 Enrollment Portfolio	50.4032	\$9.92	\$500.00
10/21/2024	Recurring Contribution Aggressive 2036/2037 Enrollment Portfolio	50.1505	\$9.97	\$500.00

**INVESTMENT TRANSACTIONS (continued)**

<b>Trade Date</b>	<b>Transaction Description</b>	<b>Units Transacted</b>	<b>Unit Price</b>	<b>Transaction Amount</b>
09/27/2024	Investment Portfolio(s) Transition In Aggressive 2036/2037 Enrollment Portfolio	261.7900	\$10.00	\$2,617.90

**ADDITIONAL INFORMATION****Happy New Year!**

Now is a great time let friends and family know that they can easily contribute to your Bright Start 529 account using the Ugift® platform for the holidays, birthdays, graduations, and other special occasions. Remember, by investing more money, more frequently – you can give your college savings account greater opportunity to grow! Visit BrightStart.com or call (877) 432-7444. Also, manage your 529 account easily with the READYSAVE™ 529 App found on the Apple App Store or Google Play.

**Audited Financials**

Bright Start 529 College Savings Plan performs an annual audit of financial statements. Results for the fiscal year that ended June 30, 2024 are now available for your review online at [https://brightstart.com/documents/brightstart\\_529\\_annual\\_report.pdf](https://brightstart.com/documents/brightstart_529_annual_report.pdf).

## Transaction Notice

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**Indiana529**

Direct Savings Plan

P.O. Box 219418  
Kansas City, MO 64121

**Account:** 616420108-01

**Account Type:** Individual 529

**Beneficiary:** Aditya Kanamarlapudi

**Date:** January 03, 2025

Haranadh Babu Kanamarlapudi  
14459 Stanley ter  
Fishers, IN 46037

Please see below for details pertaining to your recent financial activity.

### INVESTMENT SUMMARY

Portfolio Name	Units	Unit Price	Value
College Portfolio	300.0000	\$12.50	\$3,750.00
Active U.S. Equity Portfolio	339.9819	\$11.03	\$3,750.00
<b>Total Portfolio Net Worth:</b>			<b>\$7,500.00</b>

### INVESTMENT TRANSACTIONS

Trade Date	Transaction Description	Units Transacted	Unit Price	Transaction Amount
01/02/2025	Portfolio Name Contribution EBT Active U.S. Equity Portfolio	339.9819	\$11.03	\$3,750.00
01/02/2025	Contribution EBT College Portfolio	300.0000	\$12.50	\$3,750.00

Please log into your account at [www.indiana529direct.com](http://www.indiana529direct.com) to review your information in detail.

### DISCLOSURES

You should carefully review this confirmation upon receipt. If you believe this confirmation does not accurately reflect your instructions or does not accurately reflect information about your account, you must promptly notify the Plan of any inaccuracy or discrepancy; otherwise you acknowledge this confirmation to be accurate.

**Indiana529**

Direct Savings Plan

P.O. Box 219418  
Kansas City, MO 64121**Account:** 616420108-01**Account Type:** Individual 529**Beneficiary:** Aditya Kanamarlapudi**Date:** January 01, 2025

Haranadh Babu Kanamarlapudi  
14459 Stanley ter  
Fishers, IN 46037

## Account Profile - New

### ACCOUNT OWNER INFORMATION

<b>Name</b>	Haranadh Babu Kanamarlapudi	
<b>Mailing Address</b>	14459 Stanley ter Fishers, IN 46037	<b>Evening Phone</b> (713) 307-2366

Delivery Method	Email	Mail
Quarterly Statements and Disclosure Booklet Updates	✓	
Profile and Transaction Notifications	✓	
Tax Forms	✓	

### BENEFICIARY INFORMATION

<b>Name</b>	Aditya Kanamarlapudi	<b>Phone Number</b> (713) 307-2366
<b>Mailing Address</b>	14459 Stanley ter Fishers, IN 46037	<b>Date of Birth</b> 06/17/2012

### SUCCESSOR OWNER INFORMATION

<b>Name</b>	Pratyusha Bharathi Achuta
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### INVESTMENT ALLOCATIONS

<b>Portfolio Name</b>	<b>Allocation Percentage*</b>
College Portfolio	50%

## INVESTMENT ALLOCATIONS (continued)

Portfolio Name	Allocation Percentage*
Active U.S. Equity Portfolio	50%

\*Please note: Investment allocations are effective for all future contributions and do not necessarily reflect the current allocation of assets in your account.

## BANK INFORMATION

Bank Name	Bank of America
Routing Number	111000025
Bank Account Number	*****7438
Account Type	Checking

## FUNDING INFORMATION

Payment Type	Electronic Bank Transfer (EBT)
Bank	Bank of America
Account Number	*****7438
Current Amount	\$7,500.00
Begin Date	12/31/2024
Frequency	One-Time
Debit Day	3

Please Note: if the day of your transaction falls on a weekend or holiday, the transaction will be processed the following business day.

## DISCLOSURES

**For more information about the Indiana529 Direct Savings Plan (Indiana529 Direct), call 1.866.485.9415 or visit [www.Indiana529direct.com](http://www.Indiana529direct.com) to obtain a Disclosure Booklet, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing.**

**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.**

Indiana529 Direct is administered by the Indiana Education Savings Authority (Authority). Ascensus Broker Dealer Services, LLC, the program manager, and its affiliates, have overall responsibility for the day-to-day operations, including investment advisory, recordkeeping and administrative services, and marketing. The Indiana529 Direct Portfolios invest in: (i) mutual funds; (ii) a stable value account held in trust by the Authority at Vanguard; and/or (iii) an FDIC-insured omnibus savings account held in trust by the Authority at NexBank. Except for the Savings Portfolio, investments in Indiana529 are not insured by the FDIC. Units of the Portfolios are municipal fund securities and the value of units will vary with market conditions.

Ascensus Broker Dealer Services, LLC. is registered with the U.S. Securities and Exchange Commission and the Municipal Securities Rulemaking Board. For more information about the Municipal Securities

## DISCLOSURES

**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.**

**For more information about the Bright Start Direct-Sold College Savings Program ("the Plan"), call 1-877-432-7444, or visit [brightstart.com](http://brightstart.com) to obtain a current copy of the Plan Description, which includes investment objectives, risks, charges, expenses, and other important information; read and consider it carefully before investing.**

The Plan issues Form 1099-Q by January 31 each year only for accounts that had a withdrawal or an outgoing trustee-to-trustee rollover in the prior year. Form 1099-Q is distributed to either the Account Owner or Beneficiary, depending on the type of withdrawal.

You should immediately review this statement upon receipt and promptly notify the Plan of any inaccuracy or discrepancy. If you believe this statement does not accurately reflect your instructions or does not accurately reflect information about your account, you have 60 days from the date of the statement to notify the Plan; otherwise you acknowledge this statement to be accurate.

The Plan is administered by the State Treasurer of Illinois and the Illinois Department of Treasury. TIAA-CREF Tuition Financing, Inc. ("TFI"), an SEC registered investment adviser, is the Program Manager for the Bright Start Direct-Sold College Savings Program. TIAA-CREF Individual & Institutional Services, LLC ("TC Services"), member FINRA/SIPC, is the distributor for the Plan.

The Plan's Options invest in Mutual funds and/or a funding agreement. Investments in the Plan are deemed municipal securities and results will vary with market conditions. Investments are not guaranteed or insured by the State of Illinois, Illinois Department of Treasury, the Office of the Illinois State Treasurer (or any co-fiduciary or instrumentality thereof), the Federal Deposit Insurance Corporation (FDIC) (except as provided in the Plan Description solely with respect to the FDIC-insured Bank Savings Underlying Investment), or other government agency, or any of the service providers to the Plan, (including, but not limited to, TFI and TC Services).



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**DISCLOSURES (continued)**

Rulemaking Board ("MSRB"), please visit [www.msrb.org](http://www.msrb.org). There is an MSRB Investor Brochure available on the MSRB website that describes the protections available under MSRB rules and how to file a complaint with an appropriate regulatory authority.

**\*Not FDIC Insured (except for the Savings Portfolio) \*No Bank, State or Federal Guarantee \*May Lose Value**

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