LearningQuest
529 Education Savings Program

HISTORICAL PORTFOLIO PERFORMANCE FOR THE DATE ENDING MARCH 26, 2026

The following Portfolio Performance table shows the historical performance for each of the historical Portfolio options starting from the Portfolio's inception date and ending on March 26, 2026. TIAA-CREF Tuition Financing, Inc. was not the program manager at the time these Portfolios were available, and as of March 30, 2026, the Portfolios shown below are no longer available. To view the current Portfolio options, please see the mapping guide at the end of this document or visit quest529.com.

The performance data quoted represents past performance and are net of all asset-based fees and expenses as of March 26, 2026. Past performance – especially short-term past performance, is not a guarantee of future results. Investment returns and principal value will fluctuate, so investors units, when sold, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data cited and is available by calling 1-800-579-2203.

All performance figures in the table, with the exception of the performance figures in the year-to-date column, represent the average annual compound rate of the total return. All figures in the year-to-date column, represent cumulative, nonannualized returns from January 1, 2026 to February 28, 2026.

Class A Performance as of 3/26/2026						
Portfolio Name	Year to Date	1 Year	3 Years	5 Years	Since Inception	Inception Date
Diversified Portfolios						
100% Equity Portfolio A	4.34%	18.41%	17.19%	9.36%	8.31%	12/1/2003
90% Equity Portfolio A	4.02%	17.31%	16.10%	8.53%	7.15%	4/27/2007
80% Equity Portfolio A	3.73%	15.75%	14.70%	7.56%	8.90%	7/14/2017
70% Equity Portfolio A	3.43%	15.02%	13.56%	6.74%	6.26%	4/27/2007
60% Equity Portfolio A	2.95%	13.50%	12.45%	6.04%	5.73%	4/27/2007
50% Equity Portfolio A	2.64%	11.87%	10.70%	5.22%	5.12%	4/27/2007
40% Equity Portfolio A	2.25%	9.81%	9.36%	4.62%	5.51%	7/14/2017
30% Equity Portfolio A	1.85%	8.42%	8.22%	4.12%	3.69%	4/27/2007
20% Equity Portfolio A	1.59%	7.15%	7.07%	3.44%	3.62%	7/22/2016
10% Equity Portfolio A	1.27%	5.92%	5.87%	2.64%	2.82%	7/14/2017
Short-Term Portfolio A	1.00%	4.53%	4.66%	1.78%	1.86%	2/28/2002
Single-Fund Portfolios						
International Growth Portfolio A	4.93%	14.93%	9.14%	2.01%	3.75%	4/27/2007
Ultra Portfolio A	-3.87%	11.30%	22.57%	10.86%	10.31%	4/27/2007
Heritage Portfolio A	-0.20%	5.91%	13.62%	3.74%	8.93%	4/27/2007
Small Cap Growth Portfolio A	3.05%	12.82%	10.77%	2.16%	8.99%	4/27/2007
Large Cap Equity Portfolio A	-0.11%	11.33%	16.5%	10.59%	9.49%	4/27/2007

Value Portfolio A	8.99%	18.82%	12.97%	11.17%	11.11%	7/1/2010
Mid Cap Value Portfolio A	9.5%	14.53%	9.51%	9.34%	8.30%	4/27/2007
Global Real Estate Portfolio A	10.26%	13.14%	10.02%	7.09%	4.41%	4/27/2007
Inflation Protection Bond Portfolio A	0.83%	4.06%	4.38%	2.82%	2.83%	4/27/2007
Global Bond Portfolio A	1.48%	4.63%	3.90%	-3.15%	-0.27%	7/1/2020
Diversified Bond Portfolio A	1.82%	5.67%	4.52%	-0.19%	2.78%	4/27/2007
Cash and Cash Equivalents Portfolio A	0.57%	4.05%	4.84%	3.29%	2.46%	7/14/2017

Class C Performance as of 3/26/2026

Portfolio Name	Year to Date	1 Year	3 Years	5 Years	Since Inception	Inception Date
Diversified Portfolios						
100% Equity Portfolio C	4.21%	17.49%	16.32%	8.55%	7.55%	12/1/2003
90% Equity Portfolio C	3.90%	16.47%	15.25%	7.72%	6.36%	4/27/2007
80% Equity Portfolio C	3.60%	14.91%	13.85%	6.76%	8.09%	7/14/2017
70% Equity Portfolio C	3.33%	14.12%	12.75%	5.93%	5.48%	4/27/2007
60% Equity Portfolio C	2.90%	12.69%	11.57%	5.24%	4.95%	4/27/2007
50% Equity Portfolio C	2.48%	10.96%	9.82%	4.43%	4.34%	4/27/2007
40% Equity Portfolio C	2.12%	9.00%	8.55%	3.84%	4.73%	7/14/2017
30% Equity Portfolio C	1.65%	7.63%	7.40%	3.33%	2.92%	4/27/2007
20% Equity Portfolio C	1.39%	6.33%	6.26%	2.66%	2.85%	7/22/2016
10% Equity Portfolio C	1.19%	5.11%	5.09%	1.86%	2.06%	7/14/2017
Short-Term Portfolio C	0.88%	3.79%	3.88%	1.02%	1.15%	2/28/2002
Single-Fund Portfolios						
International Growth Portfolio C	4.68%	14.12%	8.31%	1.24%	3.00%	4/27/2007
Ultra Portfolio C	-4.00%	10.48%	21.64%	10.02%	9.49%	4/27/2007
Heritage Portfolio C	-0.32%	5.10%	12.77%	2.97%	8.13%	4/27/2007
Small Cap Growth Portfolio C	2.99%	11.99%	9.98%	1.41%	8.19%	4/27/2007
Large Cap Equity Portfolio C	-0.21%	10.55%	15.64%	9.77%	8.68%	4/27/2007
Value Portfolio C	8.82%	17.95%	12.12%	10.35%	10.29%	7/1/2010
Mid Cap Value Portfolio C	9.36%	13.69%	8.68%	8.53%	7.49%	4/27/2007
Global Real Estate Portfolio C	10.12%	12.27%	9.19%	6.28%	3.63%	4/27/2007
Inflation Protection Bond Portfolio C	0.82%	3.37%	3.65%	2.08%	2.07%	4/27/2007
Global Bond Portfolio C	1.43%	3.66%	3.08%	-3.88%	-1.03%	7/1/2020
Diversified Bond Portfolio C	1.68%	4.91%	3.75%	-0.94%	2.01%	4/27/2007
Cash and Cash Equivalents Portfolio C	0.51%	3.51%	4.33%	2.75%	1.95%	7/14/2017

For more information about the Quest529 Education Savings Plan, call 1-800-579-2203 or visit Quest529.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.

Please note: 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 available only for investments in that state's qualified tuition program. You should also consult your legal or tax professional for tax advice based on your own circumstances. Investments in the plan are neither insured nor guaranteed and there is the risk of investment loss.

As of March 30, 2026, TIAA-CREF Tuition Financing, Inc. (TFI), is the Plan Manager for Quest529 Education Savings Plan. TIAA-CREF Individual & Institutional Services, LLC, member FINRA, is the distributor and underwriter for the Plan. **Prior to March 30, 2026, all program-related activities, including portfolio management, were overseen by a different manager.**

INVESTMENT MAPPING

The table below illustrates how the investment portfolios were transferred on March 26, 2026.

PREVIOUS PORTFOLIOS (LEARNING QUEST ADVISOR)	CURRENT PORTFOLIOS (QUEST529)
AGE-BASED INVESTMENTS	**ENROLLMENT YEAR PORTFOLIOS**
Aggressive Investment Track	*Enrollment Year Portfolios*
90% Equity Portfolio	2042-2043 Enrollment Portfolio
80% Equity Portfolio	2040-2041 Enrollment Portfolio
70% Equity Portfolio	2038-2039 Enrollment Portfolio
60% Equity Portfolio	2036-2037 Enrollment Portfolio
50% Equity Portfolio	2034-2035 Enrollment Portfolio
40% Equity Portfolio	2032-2033 Enrollment Portfolio
30% Equity Portfolio	2030-2031 Enrollment Portfolio
20% Equity Portfolio	2028-2029 Enrollment Portfolio
Moderate Investment Track	*Enrollment Year Portfolios*
70% Equity Portfolio	2038-2039 Enrollment Portfolio
60% Equity Portfolio	2036-2037 Enrollment Portfolio
50% Equity Portfolio	2034-2035 Enrollment Portfolio
40% Equity Portfolio	2032-2033 Enrollment Portfolio
30% Equity Portfolio	2030-2031 Enrollment Portfolio
20% Equity Portfolio	2028-2029 Enrollment Portfolio
10% Equity Portfolio	Enrolled Portfolio
Conservative Investment Track	*Enrollment Year Portfolios*
60% Equity Portfolio	2036-2037 Enrollment Portfolio
50% Equity Portfolio	2034-2035 Enrollment Portfolio
40% Equity Portfolio	2032-2033 Enrollment Portfolio
30% Equity Portfolio	2030-2031 Enrollment Portfolio
20% Equity Portfolio	2028-2029 Enrollment Portfolio
10% Equity Portfolio	Enrolled Portfolio
Short-Term Portfolio	Principal Plus Interest Portfolio
STATIC PORTFOLIOS	MULTI-FUND PORTFOLIOS
100% Equity Portfolio	Aggressive Growth Portfolio
90% Equity Portfolio	Aggressive Growth Portfolio
70% Equity Portfolio	Aggressive Portfolio
60% Equity Portfolio	Moderate Portfolio
50% Equity Portfolio	Moderate Portfolio
30% Equity Portfolio	Conservative Portfolio
20% Equity Portfolio	Conservative Portfolio
Short-Term Portfolio	Principal Plus Interest Portfolio
SINGLE-FUND PORTFOLIOS	INDIVIDUAL FUND PORTFOLIOS
Ultra Portfolio	U.S. Equity Index Portfolio
Heritage Portfolio	U.S. Equity Index Portfolio
Small Cap Growth Portfolio	U.S. Small Cap Equity Index Portfolio

Large Cap Equity Portfolio	U.S. Equity Index Portfolio
Value Portfolio	U.S. Equity Index Portfolio
Mid Cap Value Portfolio	U.S. Equity Index Portfolio
International Growth Portfolio	International Equity Index Portfolio
Global Real Estate Portfolio	U.S. Equity Index Portfolio
Global Bond Portfolio	Bond Index Portfolio
Inflation Protection Bond Portfolio	Bond Index Portfolio
Diversified Bond Portfolio	Bond Index Portfolio
Cash and Cash Equivalents Portfolio	Principal Plus Interest Portfolio