



IAAdvisor 529 Plan - Mobile App

Frequently Asked Questions (FAQ)

Q1: How do I log in after downloading the IAAdvisor 529 Plan mobile app from the store?

A:

- **Existing portal users**
 - a. Click on the app icon on your phone
 - b. You should see the login screen
 - c. Enter your existing User ID/Password that you use to log into the web version of the app
- **New users with existing accounts**
 - a. Click on the app icon on your phone
 - b. You should see the login screen
 - c. Below the User ID/Password input box there is a **Get Online Access** link
 - d. Click on the link and complete the self-registration steps

When the self-registration process is completed, you will be redirected to the mobile app.

Q2: I forgot my password. Can I reset it using the mobile app?

A:

- Follow the steps outlined below:
 - a. There is a link on the login screen which says **“Forgot Password”**
 - b. Click the [Forgot Password](#) link and follow the steps.

After creating a new password, you will need to click the app icon on your phone and login using your User ID and newly created password.

Q3: I forgot my User ID. Can I reset it using the mobile app?

A:

- Follow the steps outlined below:
 - a. There is a link on the login screen **“Forgot User ID”**

- b. Click the [Forgot User ID](#) link and follow the steps.

After retrieving the User ID, you will need to click the app icon and login using the retrieved User ID.

Q4: What versions of the IOS and Android will be supported?

A:

The application can be installed on Android version 8, iOS version 13 and above. Any device with an OS below these specifications will not see the application when searching in the stores (Google Play and App Store automatically hide apps that do not support the user's device).

Q5: Can I take a screenshot of my app (screen recording)?

A:

- a. For users that are accessing the app through their iOS devices, screenshots are possible.
- b. For users accessing their app through Android devices, screenshots are possible.

Q6: What happens when I am in airplane mode?

A:

While you can use the app in airplane mode, there will be no network access and you will not be able to download/access account information.

Q7: The app is not loading on my phone from the store. What can I do?

A:

- Check your device settings.
- Check available storage on your phone for app download.
- For questions about iOS products/store/device settings/services
 - Contact Apple customer service at 1 (800) 275-2273 or
 - Select <https://getsupport.apple.com/> for help from Apple team
- For questions about Android products/store/device settings/services
 - Contact Google customer care at 1-855-466-4438 or
 - Click <https://support.google.com/store/> for Google Store help
 - Click <https://support.google.com/googleplay/> for Google Play help
- For issues related to the mobile app login/performance/data etc.

We need to investigate further. Please call us at (800) 774-5127, Monday-Friday, from 8:00 a.m.– 6:00 p.m. EST

Q8: After logging into the app, there is no data loading/the app is spinning/ app is very slow/it is taking a long time to download my statements. What should I do?

A:

We need to investigate further. Please call us at (800) 774-5127, Monday-Friday, from 8:00 a.m.– 6:00 p.m. EST

Q9: Are there any fees associated with the Mobile app?

A:

There is no fee to access the Mobile App and Mobile Website. However, standard text message and data rates may apply. Please check with your carrier for more detail.

Q10: How will I know about updates to the app?

A:

Updates to the apps are shown by the appropriate app store. You will need to download the new version of the app from Appstore/Playstore.