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Catalis and Creative Planning Launch Strategic Partnership to Modernize the 529 Savings Experience

New Partnership Simplifies the Savings Experience, Expands Investment Choice and Lowers Costs for Mississippi 529 Savers

ALPHARETTA, GA, UNITED STATES, August 11, 2026 /EINPresswire.com/ -- Catalis, one of the nation's leading providers of 529 education savings plans, and Creative Planning, one of the nation's leading independent registered investment advisor firms, today announced a modernization and relaunch of the Mississippi Affordable College Savings (MACS) Plan.

As MACS' new investment manager, Creative Planning brings more than 40 years of institutional investment expertise to the 529 savings plan market. The partnership pairs Catalis' savings program platform with Creative Planning's open-architecture investment approach to deliver a simpler, more modern experience for families saving for education.

> "By combining Catalis' modern 529 platform with Creative Planning's open architecture, we're helping Mississippi families save with more choice, lower costs and greater simplicity."
>
> *Scott Roza, CEO, Catalis*

Investment Innovation for Today's 529 Savers

The modernized MACS Plan is designed to make saving easier, more flexible, and more cost-effective for account owners. Key enhancements include:

• Enrollment year portfolios that automatically adjust over time, giving savers a clear path toward future education expenses.
• Simplified risk-based portfolios for account owners who prefer a streamlined investment

selection.
• Reduced costs for MACS account owners, with a 20% fee reduction from the current structure.
• An enhanced planning tool to help customers choose investments during enrollment.

“To drive value to our 529 plan clients, Catalis purposely sought an investment partner that offers both true open investment architecture and strong access to top national investment firms,” said Catalis CEO Scott Roza. “Open architecture is a bedrock principle for Creative Planning, and they are uniquely positioned to deliver innovation and value to the 529 savings plan market.”

“We’re excited to bring Creative Planning’s open-architecture investment approach to the 529 educational savings market,“ said Creative Planning CEO Peter Mallouk. “Our breadth and leverage create efficiencies that will deliver a more modern experience and greater value for families saving for education.”

Modern Payments and Digital Tools

The investment transition is part of a broader modernization effort by Catalis that brings market-leading payment innovation directly into the 529 customer account experience through a single login, including:

• Digital wallet gifting through PayPal and Venmo, including cryptocurrency, making it easier for friends and family to contribute.
• Visa and Mastercard prepaid cards that help students pay for textbooks and other qualified education expenses.

“Together, Catalis and Creative Planning are bringing Mississippi families a modernized 529 platform built for value, choice and long-term savings success,” said Catalis CEO Scott Roza.

About Catalis

Catalis provides services to fourteen 529 education savings and ABLE disability savings programs across the US. As a trusted partner to state-sponsored savings programs, Catalis brings deep experience in 529 program administration, participant recordkeeping, customer engagement, and digital account management to help families plan, save, and pay for future education expenses. The company is also a leading national provider of payments solutions to the public sector, pairing modern SaaS solutions with secure, scalable payment technology that helps governments streamline transactions, modernize services, and better engage citizens. Learn more at catalisgov.com.

About Creative Planning

Creative Planning, LLC is an independent wealth management firm that provides a financial-planning-led investment management approach, institutional money management, retirement planning, estate planning, trust services, tax advice, and family office services for individuals, as well as business services. Creative Planning and its affiliates have approximately $750 billion in assets under management or advisement as of June 30, 2026. Creative Planning Institutional Advisors, LLC, United Capital Financial Advisors, Baseline Wealth Management Ltd., and MASECO LLP are affiliates of Creative Planning.

Eric Johnson
Catalis
+1 612-309-7111
eric.johnson@catalisgov.com
