

Arizona State Treasurer **KIMBERLY YEE** 2025 ACCOMPLISHMENTS

Safe Investing of Taxpayer Dollars

- Oversaw an increase in the Arizona Treasury's total Assets Under Management by 110% to \$32.2 billion since taking office in January 2019.
- Distributed more than \$1.46 billion in investment earnings in Fiscal Year 2025. \$481.3 million in earnings were distributed to Permanent Land Endowment Trust Fund beneficiaries, \$634.5 million to State Agencies and \$346.6 million to LGIP clients.
- Distributed a historical high of nearly \$6 billion in total earnings over the last seven years.
- Increased Local Government Investment Pool (LGIP) assets by 145% since taking office, with AUM reaching \$8 billion, a record-high in Arizona's history.
- Oversaw a historic record-high market value of the Permanent Land Endowment Trust Fund (PLETF) of nearly \$10 billion, an increase of 71% since taking office.

Financial Transparency

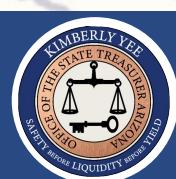
- Earned top financial rating for the Arizona Treasury's Local Government Investment Pool 5 of 'AAAf' and 'S1+' ratings in the past 18 years.
- First State Treasurer to address the Navajo Nation Council in Window Rock, where she shared about financial education and preparing the future workforce with careers and trades for economic prosperity.
- Visited various Arizona counties to meet with Local Government Investment Pool clients to provide an update on how the Arizona Treasurer's Office is managing and increasing their investment earnings to grow funds for local taxpayers.
- Invested Arizona taxpayer dollars to achieve a maximum return on the investment while keeping costs low and maintaining safety first, exceeding goals for investment objectives.
- Maintained the AZ Checkbook on the Treasury website to provide daily status and monthly comparisons of money in state and agency services.

Promoting Financial Literacy

- Continued to advance financial education across the state with the Financial Literacy Task Force where members focused on specific areas to create accessible resources.
- Spoke with students, senior citizens, military and veteran groups, professional associations, teacher groups, community and nonprofit organizations, employers, local leaders, diverse communities and people across Arizona about the importance of financial education and wise money management.
- Expanded financial education and outreach initiatives to schools and diverse communities in economically disadvantaged areas, offering guidance on saving, responsible spending, and promoting free resources available at AZTreasury.gov.
- Proclaimed April 2025 as Financial Literacy Month.

AZ529, Arizona's Education Savings Plan

- Increased AZ529 Plan assets to over \$2.87 billion, with 63,586 new accounts opened in 62 months to help families save for higher education, skills training and workforce development.
- Maintained a Silver-Medalist Rating from Morningstar's annual 529 plan ratings for the third year in a row, making the AZ529 Plan among the best 529 Plans in the country.
- Named one of the "Best 529 Plans of 2026" by Forbes, highlighting the AZ529 Plan for its exceptional investment performance, competitive fees, and robust state benefits.
- Hosted year-round statewide art and essay contests for kindergarten through 12th grade students to help them plan for their future education, with winners receiving \$529 towards an AZ529 Education Savings Plan account from every county in Arizona.
- Expanded community engagement by awarding an AZ529 Plan to the first baby born on May 29th (5/29 Day) and honoring National Adoption Month with \$529 towards an AZ529 Plan for a 12-year-old adopted girl from foster care.
- Continued to expand outreach to Hispanic and Native Indigenous communities, including translating AZ529 marketing materials and advertisements into Spanish and Navajo.



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AZ529
ARIZONA'S EDUCATION SAVINGS PLAN
TREASURER KIMBERLY YEE