

Bond Case Briefs

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MSRB Rule G-45 on 529 Plan Data Collection: Upcoming Effective Date and New Manual.

The Municipal Securities Rulemaking Board (MSRB) reminds dealers of the February 24, 2015 effective date for new Rule G-45 requiring underwriters of 529 college savings plans to electronically submit information about those plans to the MSRB through its [Electronic Municipal Market Access \(EMMA®\) system](#). Rule G-45 establishes semiannual reporting periods, the first of which is January 1 – June 30, 2015. Additional data on investment option performance is due on an annual basis, beginning with information for calendar year 2015.

Underwriters have 60 days following the end of each semiannual reporting period and calendar year to submit the required information to the MSRB. [Read the approval notice for Rule G-45.](#)

The MSRB will host an educational webinar about Rule G-45 on Thursday, March 12, 2015 at 3:00 p.m. ET. [Register here.](#)

To assist 529 plan underwriters in using electronic Form G-45 to comply with the new submission requirements, the MSRB is providing a [manual and specifications document](#). As the manual describes, submitters can choose to submit Form G-45 via the EMMA Dataport web user interface or via an automated computer-to-computer (B2B) interface. The MSRB has also created beta test environments to allow submitters to conduct tests and ensure proper programming and configuration of their applications for making Form G-45 submissions to the EMMA system using either method:

[EMMA Dataport Web User Interface Beta Environment](#)

[Automated B2B Interface Beta Environment](#)

Please contact MSRB Support at 703-797-6668 with any questions.