



Presenting

The College Savings Foundation Conference

Key Topics for Discussion

- › Increasing Public Awareness & Attracting New Participants
- › Sales Ideas for Financial Advisors
- › Financial Aid Overview
- › Review of 529 Industry Data

Changing Lives: Inspiring Americans to Save for College

The College Savings Foundation is pleased to bring you an informative and unique conference that delves into the ways we can inspire Americans to save for college.

Significant developments have been made in the 529 industry as we continue to strive to get the message out about saving for college.

This conference will provide the environment for open discussion on the material issues facing college savings plans today. It will also provide ideas for all participants in this industry to partner together to grow 529 plans, with the goal of helping American families save for the higher education of their children and grandchildren. It will explore substantive content such as compliance issues in advisor-sold plans, complexities of varying state benefits, strategies and sales ideas for Financial Advisors and new insight on how 529 plans might attract new participants.

Who Should Attend

The conference is open to everyone with a desire to learn more about current issues in 529 college savings plans, including program managers; investment managers; State Treasurers; state sponsors and representatives; senior managers at broker-dealers; law firms; not-for-profits; those involved in the higher education industry; current and potential vendors and financial advisors and planners.

Featured Conference Speakers

A distinguished list of speakers will be participating in the Conference, including regulators, private sector analysts, senior managers, and industry analysts.

Continuing Education Credits

The College Savings Foundation has submitted its agenda for review and accreditation for CE credits to the American College for PACE credit and CFP Board for CFB certification. As of the printing of this invitation the numbers of credits have not been determined. Once available, this information can be found on the CSF website. Please check our site at www.collegesavingsfoundation.org for this information.

Brian Boswell, Research Analyst
Financial Research Corporation

Joseph Ciccariello, Vice President, College Planning
Fidelity Investments

Jeffrey T. Cohan, Assistant Vice President
SMART 529 Programs, Hartford Life

Maggie Dietrich, Public Relations Manager
The Hartford

Sue Fogel, Chair Department of Marketing
DePaul University

Elizabeth Fontaine, Assistant Executive Director
MEFA

Lawrence Glazer, Managing Partner
Mayflower Advisors, LLC

Bruce D. Harrington, Managing Director, Syndicated
Research
Cogent Research

David Levi, Managing Director, Global Retail
Investments and Marketing
AllianceBernstein Investments

Brett Lief, President
National Council of Higher Education Loan Programs

Raymond D. Loewe, CLU, ChFC, President and Founder
College Money

Peter Mazareas, CEO
Strategic Advancement Group

Kevin McMullen, Counsel
State Farm

David Pearlman, Senior Vice President and Deputy
General Counsel
Fidelity Investments

Scott Prince, Vice President
TERI

William J. Raynor Jr., Vice President, National Sales
OppenheimerFunds, Inc.

Barbara Tornow, Higher Education Consultant &
TERI Board Member
(Previously Senior Advisor to Vice President of
Enrollment, Boston University)

Chuck Toth, Director, Education Savings Programs
Merrill Lynch

Agenda

Wednesday, January 30, 2008

2:00 p.m. Conference Registration

5:30 p.m. Opening Reception

Thursday, January 31, 2008

8:30 a.m. Welcome

8:45 a.m. The Real Experts Speak: A Review of the Pre-Conference Survey Results

This conference attracts a diverse cross section from the financial industry, state agencies and higher education industry, all with opinions on the state of 529 plans. David Levi from Alliance-Bernstein Investments will provide an overview of conference attendees and their attitudes and perceptions of where the 529 industry is headed, based on the results of the pre-conference survey.

9:30 a.m. Motivational Factors in Investment Decision-Making

A prominent behavioral economist will identify and discuss the primary factors driving our attitudes about finances and investment-making decisions.

10:30 a.m. Break

10:45 a.m. Updates on the Federal and State Front

An overview of the current regulatory and federal and state tax issues facing the 529 industry.

12:00 p.m. Lunch—Guest Speaker

1:30 p.m. From the Mouths of Financial Advisors: Proven 529 Strategies

529 plans are often thought of as a small-ticket item, but these financial advisors will share their strategies for attracting new 529 clients and building relationships with existing clients through innovative sales and marketing strategies and sales ideas.

2:30 p.m. Unraveling the Mystery of Financial Aid

The impact of 529 assets on financial aid has lessened considerably in recent years. These panelists will review trends in how parents are financing a college education, planning considerations, the various types of aid available and what is driving the cost of college.

3:30 p.m. Adjournment

6:00 p.m. Evening Event

Friday, February 1, 2008

8:30 a.m. Let's Make Our World a Better Place: Addressing 529 Systems and Compliance Issues

This session will highlight the benefits and issues with the use of the NSCC for 529 processing as well as compliance concerns and obstacles financial advisors continue to face in the 529 market.

9:30 a.m. Measuring Success: Are We Inspiring Americans to Save For College?

In addition to a factual look at sales trends for 529 plans, this panel will reveal compelling results from their firms' research studies that provide a revealing look at attitudes and perceptions about saving for college.

10:30 a.m. Break

10:45 a.m. Borrowing a Page from Someone Else's Playbook

The 529 industry is not alone in striving to increase public awareness and attract new participants. These panelists will provide insight on the successful campaigns their firms used to educate the public, introduce a product to a new market or change gears with a product's strategy. Learn how these firms have raised the bar in developing and implementing marketing strategies with significant impact.

11:45 a.m. Closing Comments

12:00 p.m. Poolside Lunch Buffet



Conference Dates & Venue

January 30–February 1, 2008

Royal Palm Hotel

1545 Collins Avenue
Miami Beach, Florida 33139
(786) 276-0177

www.royalpalmmiami.com

CASUAL BUSINESS ATTIRE

Registration Information:

Space is limited. Registration will be on a first-come, first-served basis.

Online: collegesavingsfoundation.org

Fax: (202) 223-2634

Mail: College Savings Foundation
1050 17th Street, NW, Suite 1000
Washington, DC 20036

For more information:

call Kathy Hamor at (202) 223-2631

Fees and Payments:

CSF Member: \$1,000 (1st registrant)
\$900 (Subsequent registrants)

Non-CSF Member: \$1,200 (1st registrant)
\$1050 (Subsequent registrants)

State/Non-Profit: \$500 (1st registrant)
\$450 (Subsequent registrants)

Please make checks payable to the **College Savings Foundation**. Visa, MasterCard, American Express, or Discover are also accepted.

Payments must be received no later than January 7, 2008. Late registration and payment available until January 21, 2008, with a \$100 surcharge.

* Registration fees will be reimbursed to organizations that become CSF members within 60 days of the conference.

Cancellations:

Cancellations made by January 7, 2008, will be given a full refund. If you cancel any time after January 7, 2008, we unfortunately will not be able to provide a refund. You may transfer your registration to another person at any time by providing written authorization.

Hotel Reservations:

Reservations can be made directly with the Royal Palm by calling the hotel's Reservation Department at (786) 276-0177. Please request the **College Savings Foundation Conference** when making the reservation. Room rates are \$289 per night based on availability.

About the College Savings Foundation



The College Savings Foundation (CSF) is a Washington, D.C.-based not-for-profit organization with the mission of helping American families achieve their education savings goals. CSF's members include investment managers, state officials, state program managers, law firms, accounting and consulting firms, and non-profit agencies that participate in the sponsorship or administration of 529 college savings plans. CSF works with legislators at the state and federal level, key regulators, media representatives and other interested organizations in support of education savings programs. A primary focus of CSF is building public awareness of and providing public policy support for 529 college savings plans—an increasingly vital college savings vehicle.

College Savings Foundation Members

- > **AIM Investments**
- > **AKF Consulting LLC**
- > **AllianceBernstein Investments**
- > **Allianz Global Investors (PIMCO)**
- > **American Century Investments**
- > **Boston Financial/DST Systems**
- > **Cogent Research**
- > **CollegInvest**
- > **Columbia Management**
- > **Education Trust of Alaska**
- > **Fidelity Investments**
- > **Franklin Templeton Investments**
- > **Hartford Life Insurance Company**
- > **John Hancock Financial Services**
- > **Massachusetts Education Finance Authority**
- > **MFS Investment Management**
- > **Merrill Lynch**
- > **Mintz Levin**
- > **Morgan Stanley**
- > **New Hampshire College Tuition Savings Plan Advisory Commission**
- > **OppenheimerFunds, Inc.**
- > **Rhode Island Higher Education Authority**
- > **Ropes & Gray LLP**
- > **ScholarShare Investment Board**
- > **State Farm**
- > **Sutherland Asbill & Brennan**
- > **Virginia College Savings Plan**
- > **Wells Fargo**

Registration Form

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Washington, DC 20036

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Yes! Register me for the College Savings Foundation Conference.

NAME

TITLE

COMPANY/ORGANIZATION

ADDRESS

CITY

STATE

ZIP

TELEPHONE

FAX

E-MAIL (Required, please provide to be sure you get conference updates)

Non-CSF Members

- \$1,200 First registrant
- \$1,050 Subsequent registrants

CSF Members

- \$1,000 First registrant
- \$900 Subsequent registrants

CSF State/Non-Profit Members

- \$500 First registrant
- \$450 Subsequent registrants

Payment Amount

\$ _____

Method of Payment: Check Credit Card (indicate below)
 Discover MasterCard Visa American Express

CARD NUMBER

NAME ON CARD

SIGNATURE

Please make check payable to **College Savings Foundation**.
Registration fees are reimbursed to organizations that become **CSF members** within 60 days of conference.





January 30–February 1, 2008
Miami Beach, Florida



Join Us at the College Savings Foundation Conference
Inspiring Americans to Save for College
Changing Lives



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