

# College Savings Foundation (CSF) Membership Application

CSF is a not-for-profit organization based in Washington, D.C. Its mission is to help American families achieve their higher education savings goals. CSF does this by working with public policy makers, media representatives and financial services industry executives in support of education savings programs.

## About CSF

CSF builds public awareness of and provides public policy support for 529 college savings plans. CSF's members include states and state agencies that establish and maintain these plans and firms that provide services to the plans. CSF members include investment managers, broker/dealers, program administrators, law firms, and accounting and consulting firms.

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**CSF Agenda:** CSF focuses on promoting, protecting and enhancing 529 plans.

○ ***A Forum for Discussion and Action:***

CSF brings together the industry, states and consumers to address policy questions, and provides a means for unified action on issues of concern to 529 plan investors and others involved with the plans. CSF provides a framework for its members to formulate industry policies, to develop issues of common concern to all plans, and serves as a resource for policymakers who share CSF's objective of helping families realize their education savings goals.

○ ***Supporting Analysis and Knowledge:***

CSF provides its members with a steady stream of timely information on legislative, regulatory, media and market developments affecting 529 plans and college savings generally. On behalf of the industry, states, consumers and policymakers, CSF is also building an extensive database that serves as a trusted source for detailed and reliable analysis and background information on all aspects of 529 plans.

○ ***Outreach to the Public and Financial Media:***

CSF conducts extensive outreach to the public, policymakers and the media about the importance of establishing and maintaining a proactive plan for savings for higher education, using a variety of investment opportunities.

○ ***Promoting Fair Treatment and Other Sound Public Policies:***

Key policy concerns for CSF include the need for consistent federal and state tax rules for 529 plans. This includes promoting tax policies that provide equal treatment to all 529 savings programs, working to ensure that financial aid policies and practices do not undercut the incentive to save for higher education, and pursuing other policies that will encourage and protect education savings. CSF has a long record of success in this area: for example, CSF was able to include in the Pension Protection Act of 2006 a provision making permanent tax advantages of 529 plans provided on a temporary basis by 2001 Federal legislation.



CollegeSavings  
FOUNDATION

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***Please use the enrollment form on reverse side to join now!***

# Join the College Savings Foundation to...

- **Promote education savings policies that help families finance higher education**
- **Stay informed on issues affecting 529 and other education savings plans**
- **Network with the industry's most prominent professionals**



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Please return this form with  
payment to:

**College Savings Foundation**

1100 North Glebe Road  
Suite 1010  
Arlington, VA 22201

**PHONE:** 703-224-8083

**FAX:** 703-224-8001

ORGANIZATION

REPRESENTATIVE

ADDRESS

CITY/STATE/ZIP

PHONE

FAX

EMAIL

WEBSITE

## Membership Categories

**Board Membership** - Organizations that act as 529 Plan Program Managers, 529 Plan Investment Managers, State 529 Plan Sponsors and firms that offer enrollment in 529 college savings programs as a broker-dealer or otherwise. This level of membership sets direction for CSF, has voting rights and may serve as a committee chair. Board members are invited to attend all high level meetings with key public policy makers including leadership in Congress and the Administration. In addition, CSF Board members have access to Industry Reporting, Surveys and Publications.

Board \$20,000 - Firms with assets of \$1 billion or more in 529 programs\*

Board \$10,000 - Firms with assets of less than \$1 billion in 529 programs\* and broker-dealer firms with financial advisor headcount exceeding 5,000.

\* For determining the asset threshold, the combined assets as program manager, investment only management, state sponsor or held as a broker-dealer will be considered. Asset determination will be made at the time the member initially joins CSF and then annually upon membership renewal. CSF may require a firm to certify that its 529 assets are under \$1 billion.

**General Membership** - These levels of membership participate in CSF activities and serve on committees, but cannot serve as a committee chair or vote at Board meetings. These members are invited to attend and participate in general meetings with public policy makers.

○ **Sustaining Membership** - Organizations or individuals that provide legal or other services, including but not limited to general consulting and information technology, with respect to 529 plans and broker dealer firms with financial advisor headcount between 1,000 and 4,999.

Sustaining \$5,000

○ **Associate Membership** - States and non-profit organizations, sole proprietors and small businesses (less than 10 employees), educational institutions, banks, credit unions, asset managers, accounting firms and broker dealer firms with financial advisor headcount of less than 1,000 organizations that are supportive of the foundation and its mission.

Associate \$2,500

## Description of Your Organization:

### Please Note:

Contributions or gifts to the **College Savings Foundation** are not deductible as charitable contributions for federal income tax purposes.

A percentage of dues allocable to our legislative liaison and lobbying-related costs may not be deductible as an ordinary and necessary business expense.

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