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**20 Years of 529 College Savings Success**

**The Answer to American Families #1 Financial Goal: Paying for College**

**Tuesday, March 8 – Thursday, March 10, 2016**

**One Ocean Resort– Jacksonville**

**Atlantic Beach, FL**

**Agenda**

**Tuesday, March 8, 2016**

**2:00 – 5:30 p.m. Conference Registration**

**5:30 p.m. Opening Reception -- Sponsored by Legg Mason**

**Wednesday, March 9, 2016**

**7:45 a.m. Breakfast Buffet**

**8:30 a.m. Welcome to the CSF Conference**

**CSF Chair:** Mary Morris, CEO, Virginia529

**8:45 a.m. Reflecting on 20 Years of 529s**

Congress created “Qualified Tuition Programs” in 1996. 20 years later has 529 achieved its promise, potential and goals?  The panel will review the evolution of 529 Plans and milestones and assess where the Industry is today and prospects for growth in the future.   What have been the biggest challenges, successes and failures?  What can be done differently to increase participation and awareness?

**Moderator:** Peter Mazareas**,** Co-Founder, Invite Education

**Panelists:**

* William W. Montjoy, Honorary Chairman and Senior Counsel, Global Education Group
* Richard A. Davies, Senior Managing Director, Global Head of Defined Contribution and Multi-Asset Business Development, Alliance Bernstein
* Steve Dombrower, Independent 529 Plan Design Consultant

**9:45 a.m. Break**

**Sponsored by Northstar Financial Services Group**

**10:00 a.m. 529 Plan Landscape – State of Program Managers Directly from Program Managers**

529 Plan program managers in attendance discuss what is going on with their programs. They will share information such as what distribution channels they use, what was their most successful campaign in 2015, what is their best new product and what are their biggest challenges internally and externally.

**Moderator:** Rob Tirrell**,** 529 Senior Business Development Specialist, Voya Investment Management

**Participants:** Volunteer Program Managers

**10:45 a.m. How Are Broker Dealer and RIA Firms Engaging Advisors and Clients around College Savings and 529 Plans**

This session will discuss preferred methods of FA/RIA and client engagement from distributors. It will also address pricing and share class suitability and how these issues are impacting the advisor sold market

**Moderator:** Tom Morgan, Director, BlackRock, US Wealth Advisory

**Panelists:**

* Ron Schuster, Divisional Distribution Director, Morgan Stanley
* Carolyn McClanahan, MD, CFP, Director of Financial Planning, Life Planning Partners
* Nathan Ganousis, Product Leader, Managed Investments, Edward Jones

**11:50 Break for Lunch**

**12:00 p.m. Lunch – North Beach Fish Camp -- 100 1st Street**

**Sponsored by: Virginia529**

**1:15 p.m. Move to Break Out Space**

**1:30 p.m. Group Brainstorming Session -- Table Topics Session, Information Exchange, and Knowledge Sharing**

An interactive session and idea exchange meant to address topics such as: growing new accounts faster than the attrition rate, how 529’s are positioned to meet the ever-changing higher education and life-long learning environment, attracting long-term customer relationships/intergenerational strategies, and bringing 529’s to the employer channel.

**Moderators:**

Stefanie Mattson, Relationship Manager, State Farm® College Savings Plan

Rich Polimeni, Director, Education Savings Programs, Bank of America Merrill Lynch

**2:30 p.m. Family Outreach – What’s New and What’s Working in the States?**

This panel will discuss the latest and greatest ideas to incentivize all families to save for college.  Listen to experts from around the country talk about challenges and success stories in what works and what makes people establish and continue to contribute to college savings accounts.

**Moderator:  Andrea Feirstein, Managing Director, AKF Consulting Group**

**Panelists:**

* Julio Martinez, Executive Director, California ScholarShare Investment Board
* Scott Ridgely, Director of Marketing and Communications, Virginia 529
* Martha Johnston, Director of Education, Finance Authority of Maine

**3:30 p.m. Updates on Federal Legislation and Regulations**

Presidential election season is upon us. How does this impact 529s? A current review on regulation and legislation affecting the 529 industry will be discussed.

**Moderator:** Bill Raynor, Vice President, Institutional Senior Client Relationship Manager, OppenheimerFunds

**Panelists:**

* Randy Hardock, Partner, Davis & Harman
* Ernie Lanza – Shareholder, Greenberg Traurig, LLP
* Barbara Pate, Partner, Davis & Harman

**4:30 p.m. Adjournment**

**6:00 p.m. Evening Event – Casa Marina -- 691 1st St N, Jacksonville Beach**

**Sponsored by: Fidelity Investments**

Bus to start leaving hotel at 5:20

**Thursday, March 10, 2016**

**7:45 a.m. Breakfast Buffet – Sponsored by: Spectra Financial Services and Wealth Management Systems Inc.**

**8:30 a.m. ABLE – Status and Future**

What states and program managers are adopting ABLE? This panel will discuss the role of Direct Sold v. Advisor Sold ABLE accounts and what recent RFPs have been issued and awarded. In addition, the panel will include a representative from the disability community providing a unique view from that perspective.

**Moderator and Panelist:** Rachel Biar, Assistant Treasurer, Nebraska, NEST College Savings Program

**Panelists:**

* William Thompson, CPA, Esq., Deputy Executive Director, Florida Prepaid College Board
* Kathleen F. McGrath, Esq., Director, PA 529 College Savings Program,

Pennsylvania Treasury

* Christopher Rodriguez, Senior Public Policy Advisor, National Disability Institute

**9:30 a.m. Break**

**9:45 a.m.** **How American Families are Paying for College: What Does the Research Show?**

This session, based upon leading industry research, will discuss trends on higher education costs and financing, as well as the importance of college savings to families financing higher education.

**Moderator:** Arthur Dunn, Risk Officer, Boston Financial Data Services

**Panelists:**

* Jennifer Ma, Policy Research Scientist, Research, The College Board
* Keith Bernhardt, Vice President, College Planning, Fidelity Investments

**10:45 a.m. Today’s Market and Its Impact on Helping Families Save for College**

This session will look at the unique economic environment, both in terms of monetary policy and economic growth, and how it is impacting capital markets in order to determine the impact on helping families save for their future higher education expenses.  What are the challenges and opportunities in the future?

**Moderator:** Roger Michaud, Senior Vice President, Franklin Templeton Investments  
**Speaker:**

* Kristina Hooper, Managing Director, US Investment Strategist and Head of US Capital Markets Research & Strategy, Allianz Global Investors

**11:45 a.m. Break for Lunch**

**12:00 p.m. Lunch at hotel**

**Sponsored by: Boston Financial Data Systems**

**1:00 p.m. Impact of Technology on Trends in the Financial Services Industry**

A highly regarded speaker on financial planning issues, Michael Kitces will address emerging technology movements with the use of robo-advisors and advisor technology. He will specifically speak on how that blends into the 529 college savings space and what trends he thinks we need to be thinking about. This session will allow for lots of Q&A time with this renowned speaker.

**Moderator:** Chris Lynch, Senior Director, TIAA-CREF Tuition Financing, Inc.

**Speaker:** Michael Kitces, Partner and Director of Research, Pinnacle Advisory Group and Publisher of the Kitces Report

**2:00 p.m. 20 Year Prospective: What Will the 529 Industry and College Look Like 20 Years from Now?**

What do we anticipate 529s will look like as a savings vehicle for financing college? Who will be the beneficiaries? What jobs will be in demand in the future? What will college look like – and what will the impact of online education have? What will the students be like? What do we anticipate college costs will be? Will the college student of the future be competing internationally as well as nationally?

**Moderator:** Rachel Ramos, Product Manager,American Funds

**Panelists:**

* Mary Morris, CSF Chair and CEO of Virginia 529
* Young Boozer, CSPN Chair, Treasurer, Alabama
* Martin Van Der Werf, Associate Director, Editorial & Postsecondary Policy,

Georgetown University Center on Education and the Workforce

**3:00 p.m. Wrap Up and Closing Comments**

Mary Morris, Chair, CSF