



CollegeSavings
FOUNDATION

2017 Annual Conference

College Planning Challenges and the Role of 529 Plans

The Evolution of
College Planning
Outreach: Innovative
Technologies to Help
Families



- Moderator: Regina Carmon

- Kim Cook: National College Access Network

- Martha Savery: MEFA

- John Hupalo: Invite Education

Regina Carmon: College Savings Bank, a Division of NexBank SSB

College Savings Bank is the FDIC-insured 529 program manager for the Bank Plan offered in Arizona and CollegeChoice CD program in Indiana.

Available nationwide and designed to help individuals and families save towards a higher education; we offer attractive FDIC-insured products—fixed rate certificate of deposit options and high-yield savings account. Additionally, there are no fees, income limits or age limits for beneficiaries to open an Account.

As a member of the FDIC, deposits are insured by the Bank Insurance Fund of the FDIC for up to \$250,000 for accounts held in the same right and capacity.

Contact us to learn more:

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www.collegesavings.com | www.collegechoicecd.com



Kim Cook: National College Access Network

TWO OVERARCHING GOALS DRIVE NCAN'S STRATEGY AND DELIVER ITS MISSION

NCAN's mission: To build, strengthen, and empower communities committed to college access and success so that all students, especially those underrepresented in postsecondary education, can achieve their educational dreams

**Realized
by:**

Goal 1:

Promote high-quality services to support equitable outcomes for students

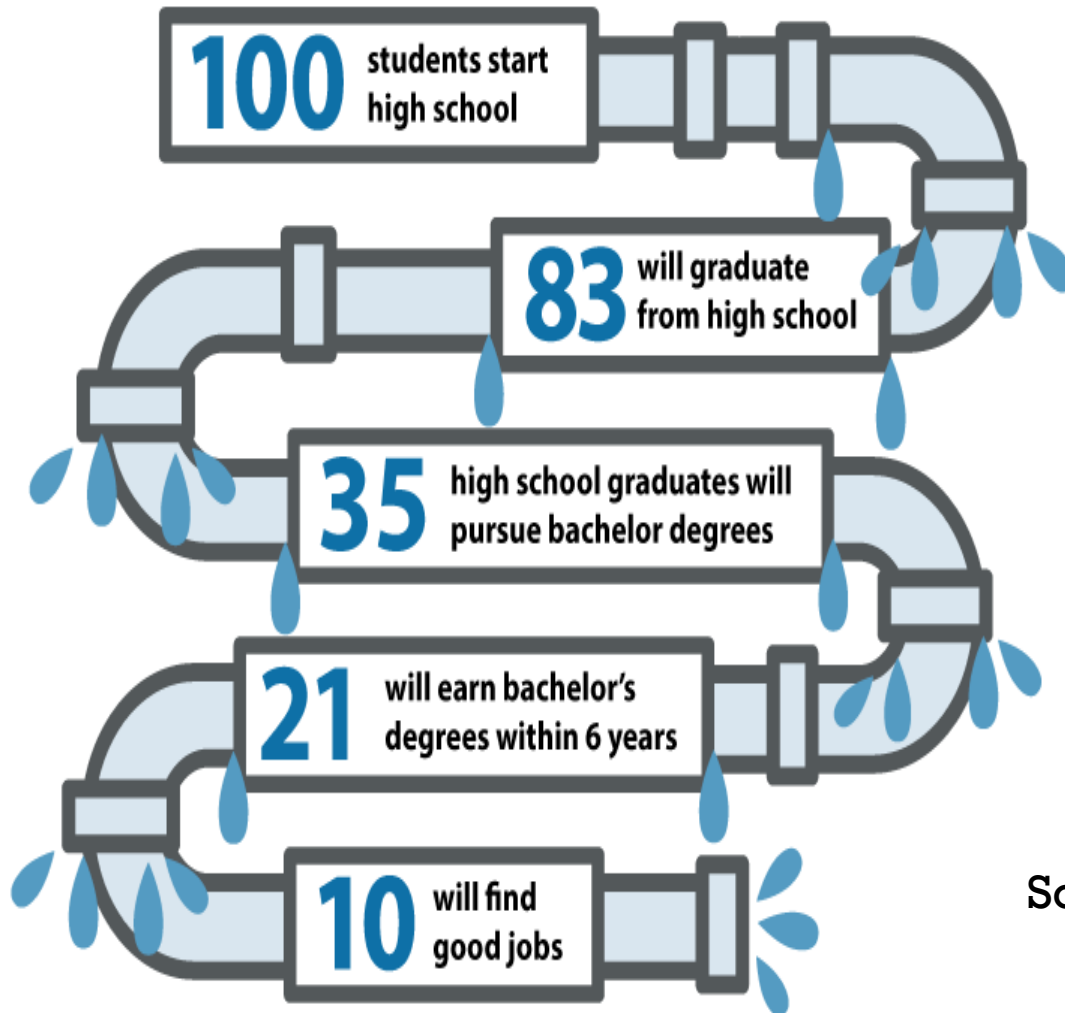
Goal 2:

Champion Practice-Informed Federal and State Policy

**Kim Cook, Executive Director
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Kim Cook: National College Access Network



Source: USA Funds

EVOLVING FINISH LINE



Access



Completion



Success



Martha Savery: MEFA

Serving the Commonwealth for over 30



Guidance, educational outreach, and training for families and the education community on planning, saving, and paying for college.



The Massachusetts 529 College Investing Plan, which combines tax advantages with Fidelity's professional investment management, making the U.Fund a flexible and affordable way to save for college.



The Massachusetts Prepaid Tuition Program, which locks in tomorrow's tuition at today's rates at over 75 public and private colleges and universities across the Commonwealth.



MEFA's low-cost alternative loans for families and students financing higher education costs.



MEFA REFI loan allows borrowers to lower their monthly payment and interest rate to help manage their cash flow



In partnership with the Massachusetts Department of Higher Education and Massachusetts Department of Elementary and Secondary Education, a free college and career planning website for students, parents, school counselors, and the community at large.

ABL
E

Currently in the development stage, MEFA's ABLE program will provide a new way of saving for the current and long-term expenses of eligible individuals with disabilities.

msavery@mefa.org



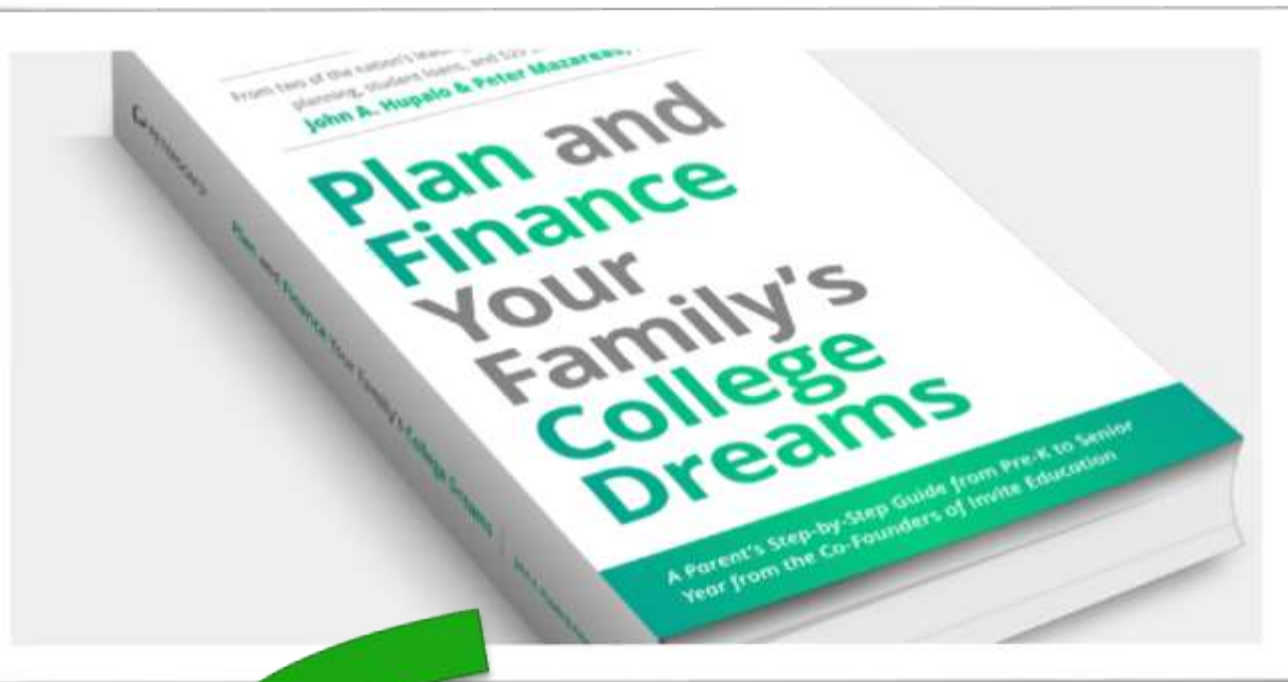
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