**College Savings Foundation**

**Membership List**

**Board Membership Level**

**American Century Investments** Stacey Belford

4500 Main Street Vice President, 529 Sales

Kansas City, MO 64111 Bus: (816) 340-3115

Bus Fax: (816) 340-3995

Email: [stacey\_belford@americancentury.com](mailto:stacey_belford@americancentury.com)

**Backer** Jordan Lee

474 Bryant Street Phone: 415-887-8465

San Francisco, CA 94107 Email: [jordan@backer.com](mailto:jordan@backer.com)

**Bank of America/Merrill**  Richard J. Polimeni

1400 Merrill Lynch Drive - 4th fl Director, Education Savings Programs

Pennington, NJ 08534 Office: 609-274-5030

Cell:    732-371-8799

Fax:    609-274-0459

Email: [Richard\_Polimeni@ml.com](mailto:Richard_Polimeni@ml.com)

**BlackRock/iShares** John Park

55 East 52nd Street Phone: 212-810-3573

25th Floor Email: [[park.john@blackrock.com](mailto:park.john@blackrock.com)](mailto:tom.morgan@blackrock.com)

New York, NY 10055

**Capital Group Companies** Reagan Anderson

2099 Pennsylvania Avenue NWPhone: 202-945-6307

Suite 400A Cell: 571-228-6806

Washington, DC 20006 Email: [Reagan.Anderson@capgroup.com](mailto:Reagan.Anderson@capgroup.com)

333 S. Hope Street Rachel Ramos

Los Angeles, CA 90071 Email: [rachel\_ramos@capgroup.com](mailto:rachel_ramos@capgroup.com)

**College Savings Bank,**  Regina Carmon

**a Division of NexBank SSB** Marketing Director

2515 McKinney Avenue **T:** 469-362-8846

Suite 1100 **C:** 732.925.3153

Dallas, TX 75201 **F:** 214.481.1289|  Attention: Operations

**Email:** [Regina.Carmon@NexBank.com](mailto:Regina.Carmon@NexBank.com)

Joanna Rotter

NexBank

2515 McKinney Ave

Suite 1100

Dallas, TX 75201

Office: 972 -763- 4090

Email: [JoAnna.Rotter@NexBank.com](mailto:JoAnna.Rotter@NexBank.com)

**Fidelity Investments** Anthony P Durkan

900 Salem StreetVice President, Head of 529 Relationship

Smithfield, RI 02917 Management

Personal Investing

Phone: 617-563-5521   
Email: [anthony.durkan@fmr.com](mailto:anthony.durkan@fmr.com)

**Franklin Templeton Investments**  Julia Giordano

101 John Kennedy Parkway Sr. Education Savings Marketing Manager

Short Hills, NJ 07078-2707 Bus. (973) 912-2045

Email: [julia.giordano@franklintempleton.com](mailto:julia.giordano@franklintempleton.com)

Roger Michaud

Senior Vice President

U.S. Advisor Services

Bus: (800) 462-1216 x36518

Other Bus: (973) 912-3704

Cell: (973) 997-0315

Bus Fax: 973-912-3385

Email: [rmichaud@frk.com](mailto:rmichaud@frk.com)

**Invesco Distributers, Inc.** Chris Werner

11 Greenway Plaza Phone/Cell: 303-589-5091

Suite 1000 Email: [chris.werner@invesco.com](mailto:chris.werner@invesco.com)

Houston, TX 77046

Arun Nanjappa

713-819-1051

[Arun.Nanjappa@invesco.com](mailto:Arun.Nanjappa@invesco.com)

**John Hancock Financial Services** John Bryson

197 Clarendon Street Vice President, Product Management

Boston, MA 02116 John Hancock College Savings

Phone: 617-663-4258

Bus. Fax: (617) 663-2226

Email: [jbryson@jhancock.com](mailto:jbryson@jhancock.com)

Deborah Smith

Phone: 617-663-4702

Email: [deborahsmith@jhancock.com](mailto:deborahsmith@jhancock.com)

**Orion Advisor Solutions , LLC** Rob Percival

17605 Wright StreetO 402.896.7498

Omaha, NE 68130 C 402.598.6544

Email: [Rob.Percival@orion.com](mailto:Rob.Percival@orion.com)

(formerly Northstar Financial Services Group)

Bill Wostoupal

o: 402-896-7194

m: 402-306-2869

**T Rowe Price** Sara Ismart

4525 Painters Mill Road Phone: 410-345-4499

Owings Mills, MD 21117 Email: [sara\_ismart@troweprice.com](mailto:sara_ismart@troweprice.com)

Christine Akins

Phone: 410-345-4499

[Christine\_Akins@troweprice.com](mailto:Christine_Akins@troweprice.com)

**TIAA**  Vivian Tsai

555 12th Street Senior Director, Head of Relationship

Suite 1280 Management

Oakland, CA 94607 Office: 510-907-2646

Cell: 925-413-5722

Email: [Vivian.Tsai@TIAA.org](mailto:Vivian.Tsai@TIAA.org)

Jean Seidel

Director – Operations Management

Office: 617-788-1415

[Jean.seidel@tiaa.org](mailto:Jean.seidel@tiaa.org)

**Virginia529** Mary Morris

9001 Arboretum Parkway  CEO

Richmond, VA 23236 Bus: (804) 786-0832

Bus Fax: (804) 323-2707

Email: [mmorris@virginia529.com](mailto:mmorris@virginia529.com)

**Virtus Investment Partners** Matt Hamel

One Financial Plaza Office: 860-263-4889

Hartford, CT 06103 Email: [matthew.hamel@virtus.com](mailto:matthew.hamel@virtus.com)

**Voya Investment Management** Paula Smith

230 Park Avenue - 14th Floor Senior Vice President

New York, NY  10169 Head of Business Development and Strategy –  
Retirement and College Savings  
Email: [Paula.Smith@voya.com](mailto:Paula.Smith@voya.com)

O: 212.309.8432

One Orange Way, C1S   
Windsor, CT 06095

**Sustaining Membership Level**

**BNY Mellon** Susan Curboy

4400 Computer Drive Phone: 508-871-4021

Westboro, MA 01588 Email: [susan.curboy@bnymellon.com](mailto:susan.curboy@bnymellon.com)

**Dimensional Fund Advisors** Todd Erskine

6300 Bee Cave Road Vice President

Building One Phone: (512) 306-7643

Austin, TX 78746 [todd.erskine@dimensional.com](mailto:todd.erskine@dimensional.com)

**Intuition College Savings Solutions** Ross Loehr

6735 Southpoint Drive South Phone: 904-654-5230

Suite 300 Email: [Rocc.Loehr@intuitioncss.com](mailto:Rocc.Loehr@intuitioncss.com)

Jacksonville, FL 32216

**Meketa Investment Group** Lisa Rubin

100 Lowder Brook Drive Phone: 781-471-3500

Suite 1100 Fax: 781-471-3411

Westwood, MA 02090 Email: [lrubin@meketagroup.com](mailto:lrubin@meketagroup.com)

**Mintz Levin** Len Weiser-Varon

One Financial Center Bus: 617-348-1758

Boston, MA 02111 Bus. Fax: 617-542-2241

Email: [lweiservaron@mintz.com](mailto:lweiservaron@mintz.com)

**New York Life Stable Value** Ed Kaminski

30 Hudson Street Phone: 201-685-6378

22nd Floor Email: [Edward\_Kaminski@nylim.com](mailto:Edward_Kaminski@nylim.com)

Jersey City, NJ 07302

**Upromise** Derek DeLorenzo

100 N. Pacific Coast Highway, 8th Floor Sr. Director, Upromise 529 Programs

El Segundo, CA 90245 Phone: 310-780-1845

Email: [derek.delorenzo@prodege.com](mailto:derek.delorenzo@prodege.com)

David O’Connell

Phone: 207-837-5712

Email: [doconnell@upromise.com](mailto:doconnell@upromise.com)

**Associate and Small Business Membership Level**

**AKF Consulting Group** Andrea Feirstein

757 Third Avenue Managing Director

12th Floor (AIM) Bus: 646-218-9864

New York, NY 10017 Fax: 212-595-1492

Cell: 917-865-2169

Email: [andrea@akfconsulting.com](mailto:andrea@akfconsulting.com)

**Chapleau Law Group** Mark Chapleau

60 State Street Bus: 781-888-5323

Suite 700 Email: [mark@chapleaulawgroup.com](mailto:mark@chapleaulawgroup.com)

Boston, MA 02109

**CollegeInvest** Angela Baier

1560 Broadway Bus. 303-376-8807 Ext. 830

Suite 1700 Bus. Fax: 303-296-4811

Denver, CO 80202 Email: [abaier@collegeinvest.org](mailto:abaier@collegeinvest.org)

Pete D’Angio

Advisor Relations

Email: [pdangio@collegeinvest.org](mailto:pdangio@collegeinvest.org)

**Education Trust of Alaska** Tammi Weaver

PO Box 755120 Bus. 907-450-8121

Fairbanks, AK 99775-5120 Bus. Fax: 907-450-8023

Email: [tyweaver@alaska.edu](mailto:tyweaver@alaska.edu)

**GiftofCollege.com** Wayne Weber

12638 N 145th Way Bus: (714) 483-6342

Scottsdale, AZ 85259 Email: [wayne@giftofcollege.com](mailto:wayne@giftofcollege.com)

**Indiana Education Savings Authority** Marissa Rowe

1 N. Capitol Ave. Phone: 317.234.8500

Suite 900

Indianapolis, IN 46204 Email: [MRowe1@tos.IN.gov](mailto:MRowe1@tos.IN.gov)

**Invite Education** Peter Mazareas

One Boston Place Phone: 617-807-0320

26th Floor Email: [peter@inviteeducation.com](mailto:peter@inviteeducation.com)

Boston, MA 02108

**ISS Market Intelligence** Paul Curley

324 Righters Mill Road Bus. 857-222-3730

Gladwyne, PA 19035-1537 Email: [Paul.Curley@strategic-i.com](mailto:Paul.Curley@strategic-i.com)

Billing address: ISS (ATTN: Paul Curley)

1177 Avenue of the Americas, 2nd Floor  
New York, NY 10036

T:  646-680-6350

**Massachusetts Educational Financing** Thomas Graf **Authority** Executive Director

60 State Street Bus: (617) 224-4801

Suite 900 800-449-6332

Boston, MA 02109 [tgraf@mefa.org](mailto:tgraf@mefa.org)

Elizabeth Fontaine

Deputy Executive Director

Bus: (617) 224-4802

Cell: (617) 901-7019.

Email: [efontaine@mefa.org](mailto:efontaine@mefa.org)

**my529** Richard Ellis

PO Box 145100 Bus: 801.321.7134

Salt Lake City, UT 84114-5100 Bus. Fax: 801-321-7299

Email:  [rellis@my529.org](mailto:rellis@my529.org)

**Nebraska College Savings Plan**  Rachel Biar

State Capitol Assistant State Treasurer

Room 2005 Phone : 402-471-1088

PO Box 94788 Fax: (402)471-4390

Lincoln, NE 68509-4788 Email: [Rachel.biar@nebraska.gov](mailto:Rachel.biar@nebraska.gov)

**New Hampshire College Tuition Savings** Monica Mezzapelle

**Plan Advisory Commission** Treasurer

25 Capitol Street Bus: (603) 271-2621

State House Annex Fax: (603) 271-3922

Room 121 Email: [monica.mezzapelle@treasury.nh.gov](mailto:monica.mezzapelle@treasury.nh.gov)

Concord, NH 03301

Kevin Davis [kevin.davis@treasury.nh.gov](mailto:kevin.davis@treasury.nh.gov)

**Ohio Tuition Trust Authority** Tim Gorrell

35 East Chestnut Street Executive Director

8th Floor Bus: (614) 466-4229

Columbus, OH 43215 Fax: (614) 644-5009

Email: [tgorrell@collegeadvantage.com](mailto:tgorrell@collegeadvantage.com)

**Private College 529** Robert Cole

7425 Forsyth Blvd. Executive Director

Suite 194 Bus.: 314 -727-0900

St Louis, MO 63112 Fax: 314 -727- 0930

Email: [Robert@pc529.com](mailto:Robert@pc529.com)

**Saving for College LLC** Marcos Cordero

444 Brickell Avenue Phone: 954-770-5136

Suite 820 Email: [Marcos@savingforcollege.com](mailto:Marcos@savingforcollege.com)

Miami, FL 33131

**ScholarShare Investment Board** Julio Martinez

915 Capitol Mall Executive Director

Sacramento, CA 95814 Direct phone number: (916) 651-8376

Bus Fax: (916) 653-0114

Email: [Julio.Martinez@treasurer.ca.gov](mailto:Julio.Martinez@treasurer.ca.gov)

**Sootchy Inc** David Adefeso

500 Grand Ave Suite #1650 Phone: 310-807-0144

Los Angeles, CA 90071 Email: [david.adefeso@sootchy.com](mailto:david.adefeso@sootchy.com)

[nathan.gierke@sootchy.com](mailto:nathan.gierke@sootchy.com)

**Spectra Professional Services** George Betzios

64 Ransom Avenue Bus: 347-662-3055

Sea Cliff, NJ 11579 Email: [gbetzios@spectraps.com](mailto:gbetzios@spectraps.com)

**The Education Trust Board of** Carolyn Fittipaldi

**New Mexico** Bus.505-476-3860

1516 Paseo De PeraltaCell: 505-412-5121

Santa Fe, NM 87501 Email: [Carolyn.Fittipaldi@state.nm.us](mailto:Carolyn.Fittipaldi@state.nm.us)

**Washington College Savings Plans**  Lucas Minor

**(WA529)**  Phone: 360-764-9210

917 Lakeridge Way SW Email: [lucasm@wsac.gov](mailto:lucasm@wsac.gov)

Olympia, WA 98502

Mailing Address:

PO Box 43450

Olympia, WA 98504-3450

**WI DFI**  Linda Lambert

4822 Madison Yards Way Phone: 608-640-6373

Madison, WI 53705 Email: [linda.lambert@dfi.wisconsin.gov](mailto:linda.lambert@dfi.wisconsin.gov)