



NATIONAL ASSOCIATION OF  
STATE TREASURERS



# LEGISLATIVE CONFERENCE 2020

FEBRUARY 9-11 | MAYFLOWER HOTEL, WASHINGTON, DC

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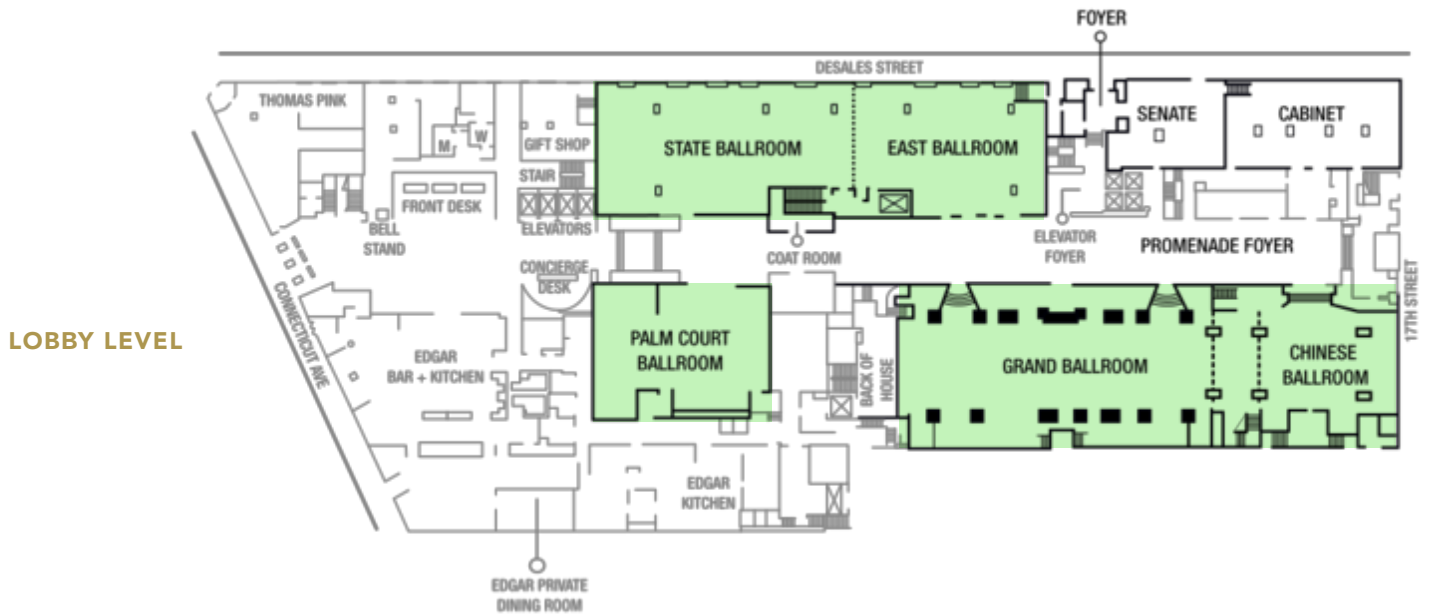
## SILVER



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## NAVIGATE THE CONFERENCE



# WHAT YOU NEED TO KNOW



This year, NAST is proud to celebrate its 45<sup>th</sup> anniversary. Our many accomplishments over the past 45 years could not have been possible without the endless support of our Members and Affiliates. We thank you, and we look forward to continuing to serve as the nation's foremost authority and advocate for sound financial practices, policies, and education.

## CONFERENCE APP

### Interact with the NAST Conference Attendees

NAST is bringing the most technologically advanced experience to our attendees through our conference app! With one download you'll be able to create a personalized agenda, quickly share contact info, interact with panels, share pictures to social media, and more.

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### VISIT [WWW.NAST.ORG/APP](http://WWW.NAST.ORG/APP) ON YOUR COMPUTER OR MOBILE DEVICE!

nastdc2020 is your key to accessing the program. Search for it in the app and use it as the event password.

Access the app features and start competing in the leaderboard.

- **Learn** – Add the events you want to attend to your personalized schedule. Export them to your calendar and never miss a moment
- **Connect** – Share your pictures, knowledge, and experiences with other attendees and the world using the conference hashtag #NASTDC.
- **Participate** – Be a part of our sessions with live polling and Q&A, access slides, documents, and speaker info

To update the app from one NAST conference to another, click on the Attendee Hub icon, click on Profile and then Switch Event. Search nastdc2020 for the new event.

## WIFI

NETWORK:

**NAST Legislative Conference**

PASSWORD:

**nastdc**

## PHOTOGRAPHY & VIDEO

During the conference, NAST will be taking photographs and video footage. We may use these images in association publications, such as NAST websites and promotional materials. Thank you in advance for your participation in our outreach and marketing activities.

SECOND FLOOR





## SUNDAY, FEBRUARY 9

11:00 AM – 7:30 PM

Registration

State Ballroom Foyer

11:30 AM – 12:30 PM

Banking Committee Meeting

Chinese Ballroom

12:30 – 2:00 PM

NAST Foundation & NIPF Board Meeting

Palm Court Ballroom

2:00 – 3:00 PM

Corporate Affiliate Advisory  
Board Meeting

Palm Court Ballroom

2:00 – 3:00 PM

Pension Committee Meeting

Chinese Ballroom

2:00 – 3:00 PM

CSPN Federal Initiatives  
Committee Meeting

Pennsylvania (2nd floor)

3:00 – 4:00 PM

ABLE Committee Meeting

Chinese Ballroom

3:00 – 4:00 PM

Legislative Committee Meeting

Palm Court Ballroom

4:00 – 5:00 PM

NAST Executive Committee Meeting

Palm Court Ballroom

5:00 – 5:30 PM

State Debt Management Network (SDMN)  
Meet & Greet

Chinese Ballroom

5:30 – 6:00 PM

New Attendee & Corporate Member  
Welcome Reception (Invitation Only)

State Ballroom

6:00 – 8:00 PM

Welcome & Networking Reception

State Ballroom

Join us for the official start to the conference in the State Ballroom of the Mayflower Hotel, which was originally built in 1925. We invite you to spend an evening with conference attendees and create new memories in this historic landmark.

## MONDAY, FEBRUARY 10

7:15 AM – 4:30 PM

Registration

Grand Ballroom Foyer

7:30 – 8:30 AM

Buffet Breakfast

Grand Ballroom Foyer

8:30 – 8:45 AM

President's Welcome Remarks

Grand Ballroom



Speaker:  
Treasurer &  
Receiver General  
Deborah B. Goldberg  
(MA), NAST President

8:45 – 10:00 AM

## ABLE Legislation & Regulation: How Both Impact Your State's ABLE Plan Today & Tomorrow - Part 1

Grand Ballroom

Hear from experts who will share strategies on how to advance S. 651 / H.R. 1814 the ABLE Age Adjustment Act. Attendees will also discuss history, viewpoints and possible hurdles of other ABLE legislative priorities including Medicaid Recovery, multiple account ownership, and successor beneficiaries.

**Moderator:**

- Treasurer Michael Frerichs (IL), NAST ABLE Committee Chair

**Panelists:**

- Josh Dubensky, Policy Aide, Office of the Honorable Senator Robert Casey
- Bethany Lilly, Director of Income Policy, The ARC of the United States
- Mary Morris, CEO, Virginia529
- Vince Randazzo, Public Policy Advisor, National Down Syndrome Society

10:00 – 10:15 AM

## Break

Grand Ballroom Foyer

10:15 – 11:15 AM

## Municipal Bond Update: What's Happening in the Market and on the Hill?

Grand Ballroom

The 116<sup>th</sup> Congress has introduced a number of bills related to municipal bonds and their tax-exempt status. Learn more about the current climate around bond legislation in Congress, and, more specifically, the status of efforts to reinstate tax-exempt advance refunding bonds.

**Moderator:**

- Treasurer Manju Ganeriwala (VA)

**Panelists:**

- Emily Brock, Director of the Federal Liaison, Government Finance Officers Association (GFOA)
- Steven Kantor, Regional Managing Director, Hilltop Securities
- Vikram Rai, Managing Director for Fixed Income Strategy, Citigroup

ABLE TRACK

10:30 AM – 12:00 PM

## ABLE Legislation & Regulation: How Both Impact Your State's ABLE Plan Today & Tomorrow - Part 2

East Ballroom

Attendees will learn about the role of the Social Security Representative Payee (SSRP) and the ABLE Authorized Legal Representative (ALR) and discuss how the ALR can be expanded to include SSRPs through legislation, administration, or both.

**Moderator:**

- Dante Allen, Executive Director, CalABLE Board

**Panelists:**

- Cheryl Bates-Harris, Senior Disability Advocacy Specialist, National Disability Rights Network
- David Goldfarb, Director of Advocacy, National Academy of Elder Law Attorneys
- JJ Hanley, Director, Illinois ABLE
- Meghan Marek, Assistant Attorney General, Maryland
- Chris McGee, General Counsel, Virginia529 / ABLENow

11:15 – 11:30 AM

## Break

Grand Ballroom Foyer

11:30 AM – 12:30 PM

## Update on Unclaimed Savings Bond Act

Grand Ballroom

States have a proven track record of returning unclaimed property to the rightful owners. Now it's time to include U.S. Savings Bonds to the list. Experts will speak about current legislation S. 2417 / H.R. 5269 that would empower states to locate bondholders and reunite them with the proceeds.

**Moderator:**

- Treasurer Dave Young (CO)

**Panelists:**

- Natalia Diez Riggan, Legislative Assistant and Advisor for Banking Committee, Office of Senator John Kennedy (LA)
- Nick O'Boyle, Deputy Chief of Staff, Office of Representative Ron Estes (KS)

12:30 – 1:45 PM

### Buffet Lunch & Keynote Address

Grand Ballroom

#### The Power of Advocacy

When State Treasurers speak, federal decision makers listen. Learn more about the power of advocacy and how you as a Treasurer can translate public finance priorities into action on the Hill and with the Administration.

**Moderator:**

Treasurer & Receiver General Deborah B. Goldberg (MA), NAST President

**Speaker:** Ann Marie Buerkle, Principal at Williams and Jensen, Former Member of Congress (NY-25)

ABLE TRACK

3:15 – 4:30 PM

### Collaborative ABLÉ Outreach: Working with Employers & Businesses

East Ballroom

Corporate representatives will provide an overview of their inclusion and engagement efforts with people with disabilities, share how information is shared company wide, including benefits, and discuss possible ways to promote ABLÉ through internal channels. State administrators will learn from corporate representatives how to collaborate to provide information about ABLÉ to employees and their communities.

**Moderator:**

- Eric Ochmanek, Director of Special Projects, Ohio State Treasury

**Panelists:**

- Randall Tucker, SVP Chief Diversity & Inclusion Officer, Mastercard
- Jessica Tuman, Head of Voya Cares Center of Excellence, Voya Financial
- Nora Venegas, Director, Legal and Federal Government Relations, Tyson Foods

ABLE TRACK

2:00 – 3:00 PM

### Collaborative ABLÉ Outreach: Employment Landscape

East Ballroom

Attendees will receive an overview of the national landscape of employment of people with disabilities, including how disability organizations, state/local governments and corporations are working to include people with disabilities in their hiring and employment efforts and what they can do to promote ABLÉ through their outreach channels. Resources and collaborative outreach opportunities will be shared.

**Moderator:**

- Julie Hocker, Commissioner, Administration on Disabilities, Administration for Community Living

**Panelists:**

- Jill Houghton, President/CEO, Disability:IN
- Erin Prangley, Director of Public Policy, National Association of Councils on Developmental Disabilities
- Stephen Wooderson, CEO, Council of State Administrators of Vocational Rehabilitation

3:30 – 4:00 PM

### Caucus Meeting for Deputy Treasurers/ Chiefs of Staff (State Members Only)

Rhode Island

4:00 – 4:30 PM

### Joint Caucus Meeting for Deputy Treasurers/Chiefs of Staff, Chief Information Officers & Government Policy Directors (State Members Only)

Pennsylvania

**Speaker:** Khalid Pagan, Northeast U.S. Lead for Politics & Government Outreach, Facebook

2:00 – 2:30 PM & 2:45 – 3:15 PM

### Roundtable Discussions

- Census 2020: How It Affects Your State  
**Room: Massachusetts**
- Discussion of 529 College Savings Plans  
**Room: Rhode Island**
- Focus on Retirement **Room: New York**
- Lobbying 101: The How to of Capitol Hill  
**Room: Pennsylvania**
- Updates on Cybersecurity and Fraud Prevention  
**Room: Georgia**

Expert moderators will lead two rounds of informal discussions on trending topics related to State Treasuries. Each roundtable is repeated so participants can attend more than one session.

4:30 – 5:00 PM

### Caucus Meeting for Chief Information Officers & Government Policy Directors (State Members Only)

Pennsylvania

## MONDAY, FEBRUARY 10



**6:00 – 8:30 PM**

### Evening Event at the National Museum of Women in the Arts

**Grand Ballroom**

Dine with us while viewing museum collections solely dedicated to championing women through the arts. Enjoy sculptures, paintings, photography, and other visual arts in the Great Hall, Mezzanine and Third Floor Gallery.

Thank you to our event sponsors State Street and Verus.

Buses will start to load from the conference registration desk at the Mayflower at 5:40 pm and start to return at 8:00 pm.

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**9:30 – 10:30 AM**

### Transportation to Capitol Visitor Center at First and East Capitol Streets

**Conference Registration Desk**

Meet at the conference registration desk to board the buses. There is a short walk from the bus to the Capitol and attendees will need to go through security. If possible, please check your suitcase at the hotel for pick up later in the day.

**10:30 AM – 12:30 PM**

### Speaker Series with Members of Congress

**Capitol Visitor Center Congressional Auditorium & Atrium (CVC Room 200)**

Engage firsthand with key members of Congress on issues relevant to State Treasury offices. We'll hear from Congressional leaders and key staff from both sides of the Hill and aisle, as well as have the opportunity to ask questions.

## TUESDAY, FEBRUARY 11

**7:45 AM – 10:30 AM**

### Registration

**Grand Ballroom Foyer**

**8:00 – 9:30 AM**

### Breakfast and Electoral Debate

**Grand Ballroom**

Attendees will hear a spirited debate from both sides of the aisle on the state of the elections. Hear from two well-respected pollsters as they duke it out over recent polling data, as well as hear their speculation of state and national election outcomes.

**Moderator:**

- Treasurer Shawn Wooden (CT), NAST Secretary-Treasurer

**Speakers:**

- Brooks Kochvar, Partner, Guidant Polling and Strategy
- Molly Murphy, Partner, ALG Research

**ABLE TRACK**

**10:30 AM – 12:30 PM**

### ABLE Speaker Series with Members of Congress

**Senate Visitor Center in the U.S. Capitol Visitor Center (SVC Room 208-209)**

Engage firsthand with key members of Congress on issues relevant to ABLE programs. Hear from Congressional leaders and key staff from both sides of the Hill and aisle, as well as have the opportunity to ask questions about the ABLE Age Adjustment Act, the Saving To Achieve a Better Life Experience Act, and other legislation that Congress is considering to improve the plans.

**12:00 – 1:00 PM**

### Box Lunches

Grab your lunch before you head to your meetings or stop back to pick one up if your meeting occurs earlier.

**12:30 – 4:00 PM**

### Capitol Hill Visits

Spending time with your elected officials while in DC is imperative, so when a Federal issue comes up, you will be ready to make that call and connect with the Member or senior staff.



## 2020 Conferences

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### Treasury Management Training Symposium

June 9–12, 2020

Hilton Portland Downtown  
Portland, Oregon

### Annual Conference - Convening Leaders

September 13–16, 2020

Intercontinental San Diego  
San Diego, California

## 2021 Conferences

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### Legislative Conference

February 7–9, 2021

Fairmont Georgetown  
Washington, D.C.

### Treasury Management Training Symposium

May 17–20, 2021

Indianapolis Marriott Downtown  
Indianapolis, Indiana

### Annual Conference

September 19–22, 2021

Palmer House Hilton  
Chicago, Illinois

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