



NATIONAL ASSOCIATION OF
STATE TREASURERS

2018 NAST Treasury Management Training Symposium



June 5-8 | Buena Vista Palace | Lake Buena Vista, FL



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I am pleased to welcome you to the 2018 National Association of State Treasurers (NAST) Treasury Management Training Symposium.

For over 40 years NAST has provided advocacy, support and educational opportunities for State Treasurers, their staff, and members in non-treasury agencies that complete our affiliate networks. As an association of finance officers, we strive to advance the development and administration of sound fiscal policies, prudent management of state resources, and the ongoing support of financial wellness programs in our respective states.

As our country faces a number of fiscal challenges such as aging infrastructure, rising levels of student debt, and a lack of retirement readiness and financial security, the Treasury Management Training Symposium provides a unique opportunity for our members and stakeholders to collaborate and learn from one another in solving these pressing issues.

This year's symposium offers training sessions on core functions and programs such as investing, managing pensions, overseeing state debt, the administration of unclaimed property, as well as outreach initiatives, such as administering ABLE plans, promoting financial literacy, and improving the affordability of post-secondary education.

I would like to thank the entire NAST leadership team for their hard work and continued efforts to improve the organization and serve our membership. The hard work of the Executive Committee, Program Committee, other standing committees, network affiliates, Corporate Affiliates, and NAST staff has laid the groundwork for NAST's growth and continued success. I am honored to have the support of an incredible leadership team. The success of our conferences and our shared work is heavily dependent on the hard-working NAST staff, treasurers, and other members who take on leadership posts.

It is a privilege and an honor to represent my colleagues as the 2018 NAST President. I look forward to a great week of learning and collaboration and to seeing you all again this fall at our Annual Conference in Scottsdale, Arizona.

A handwritten signature in black ink that reads "Beth Pearce". The signature is written in a cursive, flowing style.

Beth Pearce
NAST President
State Treasurer of Vermont

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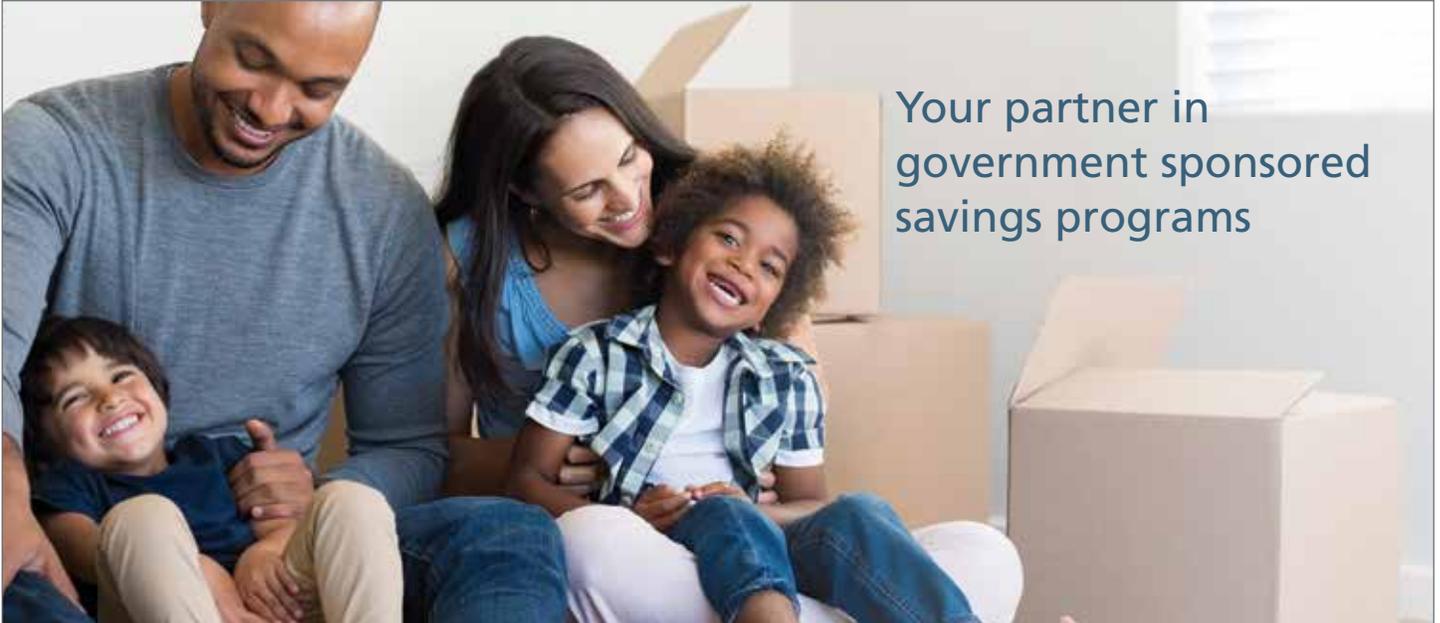
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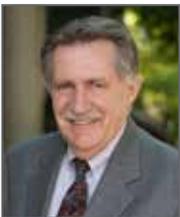
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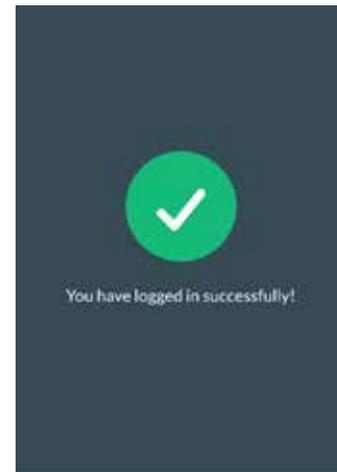
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CONFERENCE PROGRAM

TUESDAY, JUNE 5

12:00 - 7:00 P.M.

REGISTRATION

(12:00 - 5:00 in Meyer Foyer, 5:00 - 7:00 in Citron Foyer)

12:00 - 1:00 P.M.

CSPN EXECUTIVE BOARD (Tangerine 4)

1:00 - 4:45 P.M.

NAUPA UNIFORMITY & STANDARDIZATION COMMITTEE

(Tangerine 5)

This committee will meet to continue developing the NAUPA Standard File Format Reengineering Project (NAUPA 3).

1:00 - 2:00 P.M.

CSPN FEDERAL INITIATIVES COMMITTEE (Meyer 2)

2:00 - 3:00 P.M.

CSPN LEGAL & STATE AFFAIRS COMMITTEE (Meyer 2)

2:00 - 4:00 P.M.

CSPN PREPAID TUITION & GUARANTEED SAVINGS PLAN FORUM (Tangerine 4)

3:00 - 4:00 P.M.

CORPORATE AFFILIATE ADVISORY BOARD MEETING (Meyer 1)

CSPN COMMUNICATIONS COMMITTEE (Meyer 2)

4:00 - 5:00 P.M.

CSPN CORPORATE AFFILIATE COMMITTEE (Tangerine 4)

4:00 - 5:00 P.M. cont.

529 PRIMER (Meyer 2)

Up to 1 credit of CPE available

(Field of Study: Finance)

This session will cover the basics of Section 529 of the Internal Revenue Code, an overview of gift/estate tax rules applicable to 529 accounts, and other tax benefits and important legal information about the 529 college savings world.

Moderator: Jamie Canup, Partner, Tax Practice Chair, Hirschler Fleischer, LLC

4:30 - 5:30 P.M.

NAST EXECUTIVE COMMITTEE MEETING (Meyer 1)

5:00 - 6:00 P.M.

CSPN OVERVIEW (Meyer 2)

Up to 1 credit of CPE Available

(Field of Study: Specialized Knowledge)

CSPN board members will offer new and current members an overview of CSPN's Mission, Goals and committee structure, providing new members with a better understanding of how they can lend their talents to accomplish CSPN's Vision.

Moderator: Betty Lochner, Executive Director, Guaranteed Education Tuition (GET) & Past Chair of CSPN

5:30 - 6:00 P.M.

UNCLAIMED PROPERTY CORPORATE AFFILIATE MEETING (Tangerine 5)

6:00 - 8:00 P.M.

OPENING RECEPTION (Citron Ballroom North & Center)

Join your colleagues for an evening of networking to kick off the symposium!



WEDNESDAY, JUNE 6

7:30 A.M. - 4:30 P.M.

REGISTRATION (Citron Registration)

7:30 - 8:45 A.M.

BREAKFAST (Citron North/Center)

CSPN FAST PASS BREAKFAST

Fast Pass to 529 Breakfast allows first-time CSPN members to skip straight to the front of the line and connect with members of the CSPN Executive Board and other select 529 Knowledge Brokers to learn must-know information about the 529 industry and the network.

9:00 - 9:50 A.M.

TRACK SESSION 1

<p><i>Joint Session</i></p> <p>ABLE Savings Plans</p> <p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Finance</p>	<p>Act 1: 529's Tomorrow Land is Now: Opening Session: Years ago, rocket ships to Mars, robots, laser rays, and communicators on your wrist were only dreams...along with an efficient resource to help families—millions of families—plan and save for higher education. As our organization and programs have matured, some reflections on where CSPN has come from and where we're going, as we kick-off another gathering of the national 529 community.</p> <p>Moderator: Jim DiUlio, Executive Director, Wisconsin College Savings Plans & CSPN Chair</p> <p>Act 2: 529's Tomorrow Land is Now: As part of the Opening Session, Jamie Canup and Mary Anne Busse will provide an overview of the 2017 Tax Act provisions that affect both 529 and ABLE programs, including: the extension of 529 to cover K-12 tuition, tax-free rollovers from 529 to ABLE accounts, and new increases for certain ABLE contributions.</p> <p>Moderators: Mary Anne Busse, Managing Director, Great Disclosure LLC Jamie Canup, Partner, Tax Practice Chair, Hirschler Fleischer LLC</p>
<p>Banking, Cash Management & Investment (Meyer 1 & 2)</p> <p>CPE Field of Study: Finance</p>	<p>Collateral Pools: Best Practices: Discover best practices to consider in analyzing and managing state's collateral pools in this in-depth discussion between public and private sector representatives.</p> <p>Moderator: Treasurer Steve McCoy (GA)</p> <ul style="list-style-type: none"> • Jeff Sirota, Marketing Strategist, Government Banking, JP Morgan • Barry Weiss, Senior Director, Financial Institutions, Kroll Rating Agency

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Together we'll go far



CONFERENCE PROGRAM

<p>Financial Education & Empowerment (Areca)</p> <p>CPE Field of Study: Finance</p>	<p>State of the States: Best Practices in Financial Education Programs: States will share best practices in developing and running financial education programs, including examples of program success, process improvement, and measurement techniques.</p> <p>Moderator: Treasurer Tobias Read (OR)</p> <ul style="list-style-type: none"> Charon Rose, Director of Outreach & Constituent Relations, Rhode Island State Treasurer's Office Alayna Van Tassel, Deputy Treasurer & Executive Director of the Office of Economic Empowerment, Office of the Massachusetts Treasurer
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>What is the Value of a Credit Rating? Are two ratings enough? Are four too many? This panel will examine, from the investor and the issuer sides, the qualitative importance and quantitative value of ratings on municipal bonds.</p> <p>Moderator: Treasurer Manju Ganeriwala (VA)</p> <ul style="list-style-type: none"> Beth Coolidge, Managing Director, UBS Janet Lee, Senior Managing Director, Public Resources Advisory Group Linda Murphy, Vice President, Fixed Income – Municipal Analyst, T. Rowe Price
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Unclaimed Property State of the States, Part 1: Engage with NAUPA leadership and your unclaimed property colleagues. This expanded session will focus on how the association is proactively supporting states' unclaimed property programs as set in the NAUPA Five-year Strategic Plan. Leaders will be recognized for their service and we will begin asking delegation leaders to introduce their team and talk about their program's current accomplishments and opportunities.</p> <p>Moderator: Dennis L. Johnston, PMP, NAUPA President and Unclaimed Property Administrator, Utah Treasury</p> <ul style="list-style-type: none"> Carolyn Atkinson, Esq., Deputy Treasurer for Unclaimed Property, West Virginia Treasury John Gabriel, Director of Unclaimed Property, Tennessee Treasury Walter Graham, Director, Division of Unclaimed Property, Florida Department of Financial Services G. Allen Mayer, Esq., General Counsel, Illinois Treasury
<p>9:50 - 10:05 A.M. BREAK (Citron West Foyer, Meyer Foyer, Pindo Foyer)</p>	
<p>10:05 - 11:20 A.M. TRACK SESSION 2</p>	
<p>Banking, Cash Management & Investment (Meyer 1&2)</p> <p>CPE Field of Study: Finance</p>	<p>Working Together to Build America: Banking and Infrastructure Finance: Explore ways to build successful public private partnerships to finance much needed infrastructure projects.</p> <p>Moderator: Tom Clancy, Chief Investment Officer, Pennsylvania Treasury</p> <ul style="list-style-type: none"> Graeme Conway, Senior Managing Director, MIRA (Macquarie Infrastructure and Real Assets) Amy Lloyd, Director, Public Finance, Citi
<p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Finance</p>	<p>529: A Whole New World... or Not? Is the federal tax reform law's expansion of 529s to cover K-12 tuition a great new opportunity to be embraced or a distraction from the primary mission that should only be tolerated? In this small-group, interactive session each attendee will be able to share his or her views, as well as hear opposing views on issues fundamental to the essence of what 529 plans are or should become in light of the new section 529 amendments.</p> <p>Moderators:</p> <ul style="list-style-type: none"> Jamie Canup, Partner, Tax Practice Chair, Hirschler Fleischer LLC Kathleen F. McGrath, Esq., KF McGrath LLC
<p><i>Joint Session</i></p> <p>ABLE Savings Plans</p> <p>Financial Education & Empowerment (Areca)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Consumer Debt and Financial Insecurity in Today's Economy: This session will present the current landscape of consumer debt, including credit cards, auto loans, student loans, and other non-mortgage debt. Many of the 77% of American households that have debt are doing well financially, but for millions of others, debt is a source of insecurity. Those most at risk include lower-income households, unbanked or underbanked consumers, parents with young children, families of color, and people with disabilities. This session will focus on the relationships between debt and financial insecurity, such as between credit card debt and retirement savings, and identify who is most at risk. It will also discuss innovative opportunities for states to take action to address the issues that can make debt harmful to families' wellbeing.</p> <p>Moderator: Treasurer Rich Sattgast (SD)</p> <ul style="list-style-type: none"> Nanette Goodman, Senior Researcher, National Disability Institute Katherine Lucas McKay, Program Manager, Aspen Institute Financial Security Program Representative Scott Plakon, Florida House of Representatives, 29th District
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>Debt Issuance ABCs and XYZs: In order to enhance discussions of changes and new standards resulting from the recent federal tax reform, this session will revisit some of the basics related to state-level debt management. In addition, this session will identify and expand on experiences, successes, and failures that debt managers and advisors can share with others, such as; bond sale type, RFP processes, optimal bond sale dates, fixed-rate versus variable-rate, disclosure, and more.</p> <p>Moderator: David Erdman, Director, Capital Finance Office, State of Wisconsin</p> <ul style="list-style-type: none"> Neil J Flanagan, Joint Head of Municipal Finance, Managing Director, Jefferies LLC Steven J. Kantor, Regional Managing Director, Hilltop Securities

<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Unclaimed Property State of the States, Part 2: Engage with your unclaimed property colleagues. This expanded session will provide ample time for delegation leaders to continue introducing their team and talking about their program's current accomplishments and opportunities.</p> <p>Moderators:</p> <ul style="list-style-type: none"> Hon. Andrea Lea, NAUPA Senior Vice President and Arkansas Auditor of State Mark William Bracken, J.D., Assistant Treasurer of the Commonwealth of Massachusetts/Director of the Unclaimed Property Division
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11:30 A.M. - 1:00 P.M.
LUNCH & KEYNOTE PRESENTATION

<p>KEYNOTE: All tracks (Citron North/Center)</p> <p>CPE Field of Study: Economics</p>	<div data-bbox="394 510 550 695" data-label="Image"> </div> <p>Promoting Growth & Financial Security in the Current Economic Climate: Roger W. Ferguson, Jr., CEO of TIAA and former Fed vice chairman, will assess the current state of the economy and highlight the challenges our nation faces as demographic, economic, and technological forces reshape the landscape. He will offer thoughts on how states can promote growth and boost financial security at a time of unprecedented change.</p> <ul style="list-style-type: none"> Roger W. Ferguson, Jr., President & Chief Executive Officer, TIAA (see page 25 for bio)
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1:15 - 2:05 P.M.
TRACK SESSION 3

<p>Banking, Cash Management & Investment (Meyer 1&2)</p> <p>CPE Field of Study: Economics</p>	<p>A Rising Tide: Successfully Navigating the Rising Rate Environment : Learn to navigate the new and uncharted territory of the rising rate environment and the alternate investments available as a result.</p> <p>Moderator: Treasurer Young Boozer (AL)</p> <ul style="list-style-type: none"> Michael Berkowitz, Managing Director, Global Liquidity Management, Citi Thomas Tight, Managing Director, Public Trust Advisors
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CONFERENCE PROGRAM

<p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>It's a Small World: Get involved with this annual interactive session where states share marketing strategies, initiatives and ideas from their 529 program! Hear lots of great ideas and innovations!</p> <p>Moderators:</p> <ul style="list-style-type: none"> - Mary Anne Busse, Managing Director, Great Disclosure LLC - Jamie Canup, Partner, Tax Practice Chair, Hirschler Fleischer LLC
<p><i>Joint Session</i></p> <p>ABLE Savings Plans</p> <p>Financial Education & Empowerment (Areca)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Financial Education Programs for People with Disabilities: Many individuals with disabilities face unique financial challenges. Often participation in government programs restrict financial opportunities. And, limited employment opportunities further limit a person's exposure to banking and investment principals. State ABLE programs report that many potential participants lack basic financial knowledge that are essential for informed participation in ABLE programs. Financial education programs that include discussions of the unique financial challenges people with disabilities have are critically needed. This session describes what these programs should look like, how they are best delivered, and what resources are available.</p> <p>Moderator: Kathleen McGrath, Founder, KF McGrath LLC</p> <ul style="list-style-type: none"> • Susan Tachau, Chief Executive Officer, Pennsylvania Assistive Technology Foundation
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>Debt Affordability: Do you know if your state's level of public debt is affordable? This panel will explore best practices in measuring and analyzing public debt affordability from state issuer, rating agency, and research group perspectives. The discussion will provide case studies in how states have applied affordability analysis to public finance decision-making across the U.S.</p> <p>Moderator: Kelly Rogers, Deputy Treasurer for Policy & Public Finance, Rhode Island Office of the General Treasurer</p> <ul style="list-style-type: none"> • Sussan Corson, Director, S&P Global • Frances McGaffey, Senior Associate, State and Local Fiscal Health, The Pew Charitable Trusts • Ben Watkins, Director, Florida Division of Bond Finance
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Best Practices for Claims Processing Auto-Payments: Learn about returning more money to owners through proactive payments and data sharing with no claim form submitted. You will be provided with takeaways to implement this innovative initiative.</p> <ul style="list-style-type: none"> • Erin B. Egan, Director, Bureau of Tax Operations, Wisconsin Department of Revenue • Lammis Vargas, Director of Unclaimed Property, Rhode Island Treasury

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2:05 - 2:20 P.M.

BREAK (Citron West Foyer, Meyer Foyer, Pindo Foyer)

2:20 - 3:35 P.M.

TRACK SESSION 4

ABLE Savings Plans
(Areca)

CPE Field of Study:
Communications
& Marketing

A Whole New World: Understanding the Disability Community We Serve: Many of us are starting to work more closely with the disability community. In order to help them reach their financial goals, we need to understand what life is like for people with disabilities and realize that there is a lot of diversity within this community. During this session, self-advocates and parents of children with disabilities will give us insight into their lives and suggestions for how to interact with ABLE account owners. Expect to learn about person-centric language; avoiding ableism; what your language/imagery actually says to the disability community; and how to interact with people with disabilities.

Moderator: Bette Ann Mobley, Director, Maryland ABLE

- Chris Drummond, ABLE Plan Advocate
- Ginger Oreskovich, Rehabilitation Services Senior Manager Lighthouse Central FL
- Christinne Rudd, FL Alliance for Assistive Services and Technology (FAAST) Board Member

Joint Session

**Banking, Cash Management
& Investment**

**Financial Education
& Empowerment**

(Meyer 1 & 2)

CPE Field of Study:
Finance

Managing the Swings: The Unique Financial Challenges Posed by Income & Expense Volatility: New research has exposed a previously hidden reality facing millions of American families and the communities they live in: unpredictable month-to-month fluctuations in household income and expenses. This volatility destabilizes the finances of millions of American families, particularly those working in the gig economy or jobs with variable schedules. Volatility can make it hard for them to pay bills on time, save for a rainy day, pay down debt, or invest in the future. Understanding income and expense volatility is a new prerequisite for helping families – and states – build financial security. This session will summarize the research, outline the implications, and propose potential policy responses.

Moderator: Treasurer Manju Ganeriwala (VA)

- Fiona Greig, Managing Director & Director of Consumer Research, JPMorgan Chase Institute
- Tishaura Jones, Treasurer, City of St. Louis
- David Mitchell, Associate Director for Policy and Market Solutions, Aspen Institute Financial Security Program
- Rachel Schneider, Omidyar Network Entrepreneur-in-Residence, Aspen Institute Financial Security Program & Author, *The Financial Diaries: How American Families Cope in a World of Uncertainty*



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CONFERENCE PROGRAM

<p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>Imagine the 529 of Tomorrow: Hear how two 529 programs marketed their own recent transformations – Utah Educational Savings Plan as it was rebranded to “my529” and Washington’s GET program as the staff collaborated to design and then promote their new college savings plan, DreamAhead – and what they learned from the process. A marketing specialist will share tips on how to help your brand stand out.</p> <p>Moderator: Amy Lyle, Communications Coordinator, CollegeAdvantage</p> <ul style="list-style-type: none"> Richard Ellis, Senior Director for Compliance, Communications, Finance & Investments, my529 Reyna Gobel, Columnist & Author Dan Payne, Marketing and Communications Specialist, Guaranteed Education Tuition
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>Tax Reform Structuring Considerations: Join this panel to explore the post-tax reform landscape and what it specifically means for issuers.</p> <p>Moderator: James MacDonald, First Deputy Treasurer, Office of the Massachusetts Treasurer</p> <ul style="list-style-type: none"> Caroline Cruise, Portfolio Manager and Co-Head of Municipal Credit, Lowe’s Sue Perez, Executive Director, Massachusetts Clean Water Trust Brian Wynne, Head of Municipal Syndicate and Deputy Head of Public Finance, Morgan Stanley
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Unclaimed Property Legal Overview and Trends Analysis: Unclaimed property legal professionals will present an overview of the most compelling issues and emerging trends impacting state unclaimed property programs. This session will provide you with knowledge that is not obtainable elsewhere.</p> <p>Moderator: G. Allen Mayer, Esq., General Counsel, Illinois Treasury</p> <ul style="list-style-type: none"> Charles Hellman, Esq., Executive Vice President, Verus Analytics LLC Oliver Olanoff, Esq., Chief Operating Officer and General Counsel, EECS LLC Brian Scanlon, Esq., Vice President, Legal and Emerging Services, Kelmar Associates, LLC

3:35 - 3:50 P.M.

BREAK (Citron West Foyer, Meyer Foyer, Pindo Foyer)



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3:50 - 4:40 P.M.
TRACK SESSION 5

<p><i>Joint Session</i></p> <p>ABLE Savings Plans</p> <p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Economics</p>	<p>Let It Grow: 529s Are Changing, Have Your Investments Kept Up?: Today, 529s attract a broad audience with a wide range of financial education and varying liquidity needs. This panel of 529 investment managers will discuss the approach to creating an optimal investment line-up, including the evolution of investment line-ups as investor needs and demands have changed. Ultimately, they will address whether and how to tweak investments as this market expands.</p> <p>Moderator: Andrea Feirstein, Managing Director, AKF Consulting, LLC</p> <ul style="list-style-type: none"> • Jerome Clark, Vice President, T. Rowe Price Group, Inc. • Kimberly Stockton, Investment Analyst, Vanguard Investment Strategy Group • Jeremy Thiessen, Senior Director of Investment Strategies, TIAA-CREF Tuition Financing Inc.
<p>Banking, Cash Management & Investment</p> <p>(Meyer 1&2)</p> <p>CPE Field of Study: Finance</p>	<p>Blockchain and the Future of Payment Innovations : This presentation will provide an overview and perspectives on how emerging payment technologies (i.e., blockchain, zelle) will not only transform, but disrupt the treasury functions of the future, and ultimately change how treasury delivers on its mandate to optimize financial assets and liabilities, drive cash flow improvements, process cash transactions, and manage financial risk.</p> <p>Moderator: Melissa Corrigan, Chief Financial Officer, Arkansas State Treasury</p> <ul style="list-style-type: none"> • Jennifer Barker, Head of Commercial Banking Treasury Product Solutions, JP Morgan • Vivek Kohli, Director, Emergent Payment Technology, BNY Mellon • Chris Noe, Senior Vice President, Head of Innovation and Information Delivery, Treasury Management, Wells Fargo
<p>Financial Education & Empowerment (Areca)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Operation Financial Education: Military personnel and their families face unique financial challenges. Studies have repeatedly shown this population is in need of additional services and training. These challenges are amplified by the demands of a military career, and by the relative youth and financial inexperience of many service members. This session will examine topics that most commonly affect those who serve our country, and what the Consumer Financial Protection Bureau (CFPB) and Treasurers are doing to engage military families.</p> <p>Moderator: Treasurer Deborah Goldberg (MA)</p> <ul style="list-style-type: none"> • Paul Kantwill, Assistant Director, Consumer Financial Protection Bureau, Office of Servicemember Affairs • Alayna Van Tassel, Deputy Treasurer & Executive Director of the Office of Economic Empowerment, Office of the Massachusetts Treasurer



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CONFERENCE PROGRAM

<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Information Technology</p>	<p>Data Technology in Municipal Finance Industry: State treasurers can leverage data, analytics, and technology to manage debt obligations, drive investment performance; and improve disclosure and transparency practices. Panel members will discuss their successful leveraging of these tools to improve performance and outcomes.</p> <p>Moderator: James MacDonald, First Deputy Treasurer, Office of the Massachusetts Treasury</p> <ul style="list-style-type: none"> • Marcy Block, Senior Director – U.S. Public Finance, Fitch Ratings • Colin MacNaught, CEO & Founder, Bondlink • Mark Pascarella, Director, Indiana Finance Authority
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Cryptocurrency Becoming Unclaimed: Cryptocurrencies, also known as digital or virtual currencies, have exploded in popularity into a \$200 billion market. The largest exchanges have begun contacting states about abandoned cryptocurrency accounts. Unclaimed property practitioners on the ground will explore how these accounts can be handled, recent lawsuits, and dialogue about federal regulations and tax implications.</p> <p>Moderator: Bradley Earl, Unclaimed Property Director, Office of Arkansas Auditor of State</p> <ul style="list-style-type: none"> • Nicole Farrar, Esq., Senior Manager, Regulatory Affairs, Coinbase • Kelly Kuracina, Assistant Bureau Director, Office of Unclaimed Funds, Office of the New York State Comptroller

6:00 - 8:00 P.M.

ORLANDO HOUSE OF BLUES

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THURSDAY, JUNE 7

7:30 A.M. - 4:30 P.M.

REGISTRATION (Citron Registration)

7:30 - 8:30 A.M.

BREAKFAST (Citron North/Center)

DEPUTY TREASURER & CHIEF OF STAFF BREAKFAST (By Invitation) (Citron Ballroom West)

8:30 - 10:00 A.M.

KEYNOTE SESSION

KEYNOTE: All tracks
(Citron North/Center)

CPE Field of Study:
Personal Development



Disney Institute Leadership Address: Walt Disney Parks and Resorts is recognized as a leader in delivering world class experiences.

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Moderator: NAST President Treasurer Beth Pearce (VT)

- Jeff James, Vice President & General Manager, Disney Institute (see page 25 for bio)

10:00 - 10:15 A.M.

BREAK (Citron West Foyer, Meyer Foyer, Pindo Foyer)

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CONFERENCE PROGRAM

10:15 - 11:30 A.M. TRACK SESSION 6	
<p>ABLE Savings Plans (Areca)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Social Services and ABLE Plans: No one expects us to be experts in SSI, Medicaid and the rest of the complex web of social services. However, having even a minimal understanding of how these programs work will help us better serve people with disabilities. Knowing where they come from and what barriers they face will help us serve them better. For instance, they're used to jumping through hoops, filling out lots of forms and being on years-long wait lists. They hear about the ABLE program and think it's too easy to be true. We have to frequently tell people, "Yes, I know it sounds too easy. We did that on purpose knowing what you go through."</p> <p>Moderator: Christopher McGee, General Counsel, Virginia529 and ABLENOW</p> <ul style="list-style-type: none"> • Pearl Barnett, Director of Operations, National Association of States United for Aging and Disabilities
<p>Banking, Cash Management & Investments (Meyer 1&2)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Earthquakes, Crashes, and Closures, Oh My!: Business Continuity, Disaster Recovery, and Contingency Planning: Hope for the best, but prepare for the worst. This session explores the timeless wisdom and how organizations can ensure that a strong continuity plan is in place in the event of an emergency.</p> <p>Moderator: Treasurer Deborah Goldberg (MA)</p> <ul style="list-style-type: none"> • Cindy Graffenius, National Client Service Manager, Wells Fargo • Michael Rinaldi, Senior Director, Fitch Ratings • Billy Wyatt, Chief Information Security Officer & CIO, Georgia State Treasury
<p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>The Glass Slipper: A National Campaign That Fits: Get involved in the new efforts being made to raise awareness of 529 plans nationally. Join the conversation as we discuss the biggest opportunities and challenges to telling the "tale" of 529 plans. Participants will gain insights from College Savings Plan Network members, get an overview of the marketing strategy and witness the unveiling of the new 529 brand. You will leave understanding how this new initiative supports your plans.</p> <p>Moderators:</p> <ul style="list-style-type: none"> – Betty Lochner, Executive Director, Guaranteed Education Tuition (GET) & Past Chair of CSPN – Patricia Roberts, 529 Plan Consultant & CSPN Corporate Affiliate Committee Chair • Rod Coleman, Director of Project Management, Bozell • Mike Giloon, Director of Strategic Communication, Bozell • Alex Maltese, Director of Account Services, Bozell • Jackie Miller, Chief Marketing Officer, Bozell
<p>Financial Education & Empowerment (Sago 1&2)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Fintech: How to Apply New Technologies and Gamification to Financial Empowerment: This panel will examine innovative applications in the fintech space and how gamification, predictive behavioral analytics, and "learning" apps can help users save, invest, and make better financial decisions.</p> <p>Moderator: Chris Lynch, President, TIAA Tuition Financing Inc</p> <ul style="list-style-type: none"> • Rogelio Pier Martinez, Chief Operating Officer, Finhabits • Ashby Monk, Chairman & Co-Founder, Long Game • Nashila Somani-Ladha, Senior Innovation Manager, Commonwealth • Jason Young, Co-Founder & CEO, MindBlown Labs
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>Advance Refunding Alternatives: The muni market was thrown a curveball by recent legislation barring this useful tool that states used to lower refinance debt before the call date. What can states do? There is no shortage of structures that can be used to mimic the advance refunding concept. This session will explore many of the alternatives available to states in their quest to take advantage of savings before an issue is callable.</p> <p>Moderator: Mark Pascarella, Debt Director, Indiana Finance Authority</p> <ul style="list-style-type: none"> • Jessica Cameron Mitchell, Managing Director, PFM Financial Advisors • Carlos Pineiro, Vice President, Goldman Sachs • Eric Rockhold, Managing Director, Bank of American Merrill Lynch
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Combating Fraud: State investigators will provide an analysis of fraudulent unclaimed property claims, show the methods used to attempt to defraud unclaimed property programs, and highlight tools used to detect and prevent fraud.</p> <p>Moderator: Phillip Carlton, Assistant Director, Division of Unclaimed Property, Florida Department of Financial Services</p> <ul style="list-style-type: none"> • Katie Beers, Special Investigator, Pennsylvania Treasury • Charles Carter, Detective, Office of Fiscal Integrity, Division of Investigative & Forensic Services, Florida Department of Financial Services • Robert Mazzei, CFE, Detective, Office of Fiscal Integrity, Division of Investigative & Forensic Services, Florida Department of Financial Services
<p>11:30 A.M. - 12:45 P.M. NETWORKING LUNCH (Citron North/Center)</p> <p>Instead of a keynote speaker, we encourage you to introduce yourself to attendees from another state, ask about a new program, and share your own anecdote. Bring your business cards to exchange with your new colleagues!</p>	

1:00 - 1:50 P.M.
TRACK SESSION 7

<p>ABLE Savings Plans (Areca)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>From Zero to Hero in No Time Flat: Electrifying your Communications Efforts: Getting the word out about ABLE doesn't have to be a herculean undertaking. When we focus on who our audience is and how they get information, it becomes much clearer how best we can get their attention. We'll discuss how to shape your language, imagery and tone to resonate with people with disabilities; what to never say or do; and look at why certain outreach, marketing and communications strategies have worked so well.</p> <p>Moderator: Kaellen Hessel, Advocacy/Outreach Manager, Oregon ABLE Savings Plan/OregonSaves</p>
<p>Banking, Cash Management & Investments (Meyer 1&2)</p> <p>CPE Field of Study: Information Technology</p>	<p>Cyber Security: The Ever-Increasing Threat: Fraud and cybercrime are becoming the biggest threat to CFOs and Treasurers, with new threats and schemes being reported almost daily. In this session, learn how to secure your technology and educate your staff to ensure that your organization is not low hanging fruit for this ever-increasing threat.</p> <p>Moderator: PN Narayanan, Chief Information Officer, Pennsylvania Treasury</p> <ul style="list-style-type: none"> • Carolyn DeVar, Executive Director, Cyber Security, JP Morgan • Mark Koran, Regional Director, Government and Institutional Sales, Elavon (U.S. Bank)
<p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>It's a Small World... After All: Get involved with this annual interactive session where states share marketing strategies, initiatives and ideas from their 529 program! Hear lots of great ideas and innovations!</p> <p>Moderators:</p> <ul style="list-style-type: none"> - Rachel Biar, Assistant State Treasurer, Nebraska State Treasurer's Office - Troy Montigney, Executive Director, Indiana Education Savings Authority

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CONFERENCE PROGRAM

<p>Financial Education & Empowerment (Sago 1&2)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Making the Case: A Framework for Integrating K-12 Financial Education at the State and Community Levels: Looking to make inroads in K-12 financial education programs and not sure where to start? Integrating financial education throughout the K-12 experience represents a promising opportunity to reach youths at pivotal points in their development and financial lives. This panel will highlight promising state and community-based financial education practices and share research to identify critical attributes, abilities, and opportunities acquired during the years spanning preschool through young adulthood that support the development of financial capability.</p> <p>Moderator: Treasurer Beth Pearce (VT)</p> <ul style="list-style-type: none"> • Meina Banh, Senior Policy and Innovation Advisor, Office of Financial Education, Consumer Financial Protection Bureau • David Mancl, Director, Office of Financial Literacy, Wisconsin Department of Financial Institutions • Aaron Standish, K-12 Financial Literacy Coordinator, School District of Palm Beach County (FL)
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Economics</p>	<p>Bond Banks to Credit Enhancement: State Programs Designed to Help Local Governments Gain Market Access: In many parts of the country, local government revenues have not yet returned to pre-recession levels. Nonetheless, local governments are faced with growing infrastructure needs. A number of states have programs to help local governments gain market access and obtain lower borrowing rates. This panel will discuss two programs and review the strengths and weaknesses of various enhancement structures.</p> <p>Moderator: Noreen White, Co-President, Acacia Financial Group, Inc.</p> <ul style="list-style-type: none"> • Jonathan Azoff, Director of the Office of Debt Management & Senior Counsel, Office of Ohio Treasurer • Stephanie Hamlett, Executive Director, Virginia Resources Authority • Carol Spain, Director, S&P Global Ratings
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>The Revised Uniform Unclaimed Property Act (RUUPA) and the ABA Model Act: In 2016, the Uniform Law Commission adopted RUUPA with significant input from NAUPA. In 2017, a handful of states adopted RUUPA or a new unclaimed property act that drew heavily on RUUPA. In the same year, a subcommittee of the American Bar Association drafted a competing model of the unclaimed property act that is now being pushed by the Council on State Taxation (COST) and other industry critics of state unclaimed property programs. By 2018, many more states are considering RUUPA or other significant changes to their unclaimed property statute. Hear an update on RUUPA and the state-by-state battles accompanying it.</p> <p>Moderator: Carolyn Atkinson, Esq., Deputy Treasurer for Unclaimed Property, West Virginia Treasury and NAUPA Co-advisor to Uniform Law Commission Drafting Committee to Revise the Uniform Unclaimed Property Act</p> <ul style="list-style-type: none"> • Michael K. Green, Esq., Assistant Attorney General, Office of Utah Attorney General • Michael Houghton, Esq., Co-Chair, Uniform Law Commission Drafting Committee to Revise the Uniform Unclaimed Property Act



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1:50 - 2:05 P.M.

BREAK (Citron West Foyer, Meyer Foyer, Pindo Foyer)

2:05 - 3:20 P.M.

TRACK SESSION 8

<p>ABLE Savings Plans (Areca)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>For the First Time in Forever: How are people using their new ABLE plans? Now that ABLE plans have been around for a few years, we ask how are account owners using them? Are they using them for day-to-day expenses? Saving for something specific? Or putting money aside that they'll figure out how to spend later? We'll talk to real-life account owners (not animated snowmen) about what their goals are, how they chose their plan, what their savings/investing strategies are, and what features they wish they had.</p> <p>Moderator: Mary Anne Busse, Managing Director, Great Disclosure LLC</p> <p>ABLE Account Owners:</p> <ul style="list-style-type: none"> • Catherine Davey • Alicia Howard/Marjorie Hardy • John Langan • Rhonda Mortimer-Buckner • Sarah Sequenzia • Jenn Sikora
<p>Banking, Cash Management & Investments (Meyer 1&2)</p> <p>CPE Field of Study: Finance</p>	<p>Understanding the Role of the Fiscal Watchdog: Fraud Prevention and Improper Payments: Understanding your ethical responsibility is vital to your organization's success. This session will look at minimizing your operational risks, including fraud prevention and improper payments.</p> <p>Moderator: Treasurer Michael Frerichs (IL)</p> <ul style="list-style-type: none"> • David Belchick, Vice President, Public Sector Market Management, Citi • Holger Ebert, Senior Vice President and Division Manager, Treasury Management, Wells Fargo • PN Narayanan, Chief Information Officer, Pennsylvania Treasury

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CONFERENCE PROGRAM

<p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>Frozen? How to Thaw Challenging Media Situations: Join us for an interactive communications workshop where you will gain insight and practical solutions for your organization's communication needs. Learn how to navigate the sometimes icy waters of media relations and crisis communications that leave some organizations frozen when the unexpected occurs. Participants will develop case study communication plans and share their ideas in a collaborative, engaging and fun session.</p> <p>Moderator: Marissa Rowe, Outreach Coordinator, Indiana Education Savings Authority</p> <ul style="list-style-type: none"> • Raegan A. Weber, Strategic Communications Consultant
<p>Financial Education & Empowerment (Sago 1&2)</p> <p>CPE Field of Study: Finance</p>	<p>State-Run Retirement Plans: States are taking the lead to address a growing nationwide retirement savings crisis. Panelists from Oregon, California, and Illinois will discuss their state-sponsored retirement programs for private-sector employees and highlight best practices in program development and implementation.</p> <p>Moderator: Treasurer Tobias Read (OR)</p> <ul style="list-style-type: none"> • Courtney Eccles, Director, Illinois Secure Choice • Michael Parker, Executive Director, Oregon Savings Network • Katie Selenski, Executive Director, CalSavers Retirement Savings Program
<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>Green Bonds: This session will explore green bonds fund projects with positive environmental or climate benefits. The majority of the green bonds issued are green "use of proceeds" bonds. The first green governmental bond was issued by Massachusetts in 2013; other U.S. issuers have since followed suit. Recently, the California Treasurer conducted a two-day symposium on how to grow the green bond market in the U.S. This session will offer insights on how to approach and effectively use this growing segment of the debt markets.</p> <p>Moderator: Tim Schaefer, Deputy Treasurer for Public Finance, Office of California State Treasurer</p> <ul style="list-style-type: none"> • Kurt Forsgren, Managing Director, S&P Global • Eva Rippeteau, Director, Fitch Ratings • Maulin Shah, Director, Bank of America Merrill Lynch • Steve Wlodarski, Managing Director, Portfolio Management, McDonnell Investment Management, LLC
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>Effectively Framing the Unclaimed Property Message: Panelists will share how they have told their unclaimed property stories to customers, policy makers, and in the public arena. Go beyond the press release for a deeper dive into crafting communications that resonate.</p> <p>Moderator: Walter Graham, Director, Division of Unclaimed Property, Florida Department of Financial Services</p> <ul style="list-style-type: none"> • Ingrid Bolen, Unclaimed Property Program Specialist, Idaho Treasury • Lynden Lyman, Esq., Executive Consultant, Kelmar Associates, LLC • Caroline Marshall, Esq., General Counsel and Chief Operating Officer, Verus Analytics LLC • Benno C. Schmidt III, Media Director, Verus Analytics LLC
<p>3:20 - 3:35 P.M. BREAK (Citron West Foyer, Meyer Foyer, Pindo Foyer)</p>	
<p>3:35 - 4:25 P.M. TRACK SESSION 9</p>	
<p><i>Joint Session</i></p> <p>ABLE Savings Plans</p> <p>College Savings Plans (Citron Ballroom East & West)</p> <p>CPE Field of Study: Finance</p>	<p>Imageneering 529s: Governance and fiduciary duties are at the core of every 529 and ABLE plan sponsor's obligations. This session will focus on what good governance looks like and provide tools to help plan sponsors confidently satisfy the fiduciary duties owed to account owners and their beneficiaries.</p> <p>Moderator: Treasurer Young Boozer (AL), Past CSPN Chair</p> <ul style="list-style-type: none"> • Julia Hoke, Director of Legal Affairs & General Counsel, North Carolina State Education Assistance Authority • Alan Rudnick, Governance Consultant
<p>Banking, Cash Management & Investments (Meyer 1&2)</p> <p>CPE Field of Study: Finance</p>	<p>Best Practices in LGIP Risk Management and Stress Testing: This session will review the NAST Voluntary Guidelines for LGIPs and discuss best practices in risk management and stress testing due to the proliferation of regulatory requirements (GASB, SEC, etc.), using examples of prior events where lack of such framework led to disastrous consequences.</p> <p>Moderator: Treasurer Steve McCoy (GA)</p> <ul style="list-style-type: none"> • Gregory Fayvilevich, Senior Director, FitchRatings • Roderick Fisher, Head, Risk Solutions, State Street Bank • Michael Masih, Associate Director, S&P Global
<p>Financial Education & Empowerment (Sago 1&2)</p> <p>CPE Field of Study: Communications & Marketing</p>	<p>State of the States: How to Develop and Launch a Financial Education Program: States will share their experiences developing and running specific financial education programs and events, and provide the roadmap for others to follow in their footsteps and implement the ideas in your state.</p> <p>Moderator: Emelia Nordan, College Savings Plans and Policy Director, Office of the Mississippi State Treasurer</p> <ul style="list-style-type: none"> • Jana Langemach, Assistant State Treasurer, Director of Communications, Office of the Nebraska State Treasurer • Sheila Salehian, Deputy Treasurer for Prepaid Tuition, 529 College Savings Plans & Financial Literacy, Office of the Nevada State Treasurer • Catherine Seat, Communications Director, Office of the Indiana Treasurer of State

<p>State Debt Management (Sunburst)</p> <p>CPE Field of Study: Finance</p>	<p>Analysis of Short Call Options and Couponing Strategies: The recent tax reform law eliminated state and local government's ability to issue advance refunding bonds thus, issuers may have to structure their bonds with call options shorter than the traditional municipal 10-year par call. While increased optionality is attractive the strategy is not without trade-offs. Join us for an analytical review of the benefits and trade-offs of utilizing short call options, and the impact that various coupon strategies can have on such offerings.</p> <p>Moderator: Jason Richter, Deputy Treasurer, Debt Management, Washington State Treasurer's Office</p> <ul style="list-style-type: none"> • Tom Huestis, Senior Managing Director, Public Resources Advisory Group • Brendan Troy, Managing Director, Bank of America Merrill Lynch
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Legislative Round-Up and Trends: This session will provide a comprehensive analysis of unclaimed property legislation and trends.</p> <p>Moderator: Kathleen Lobell, Director of Unclaimed Property, Louisiana Treasury</p> <ul style="list-style-type: none"> • Suzanne Darling, Esq., Kelmar Associates, LLC

6:00 - 8:00 P.M.
SPLITSVILLE LUXURY LANES

On Thursday, conference attendees will go to **Splitsville Luxury Lanes**, an upscale bowling and entertainment venue featuring 50,000 square feet of bowling and billiards. Whether you enjoy bowling, billiards or just want to network with other attendees, you won't want to miss out. Food and drinks will be provided.

Transportation Info: Splitsville is located in Disney Springs, about one mile away from the Hilton Buena Vista Palace, with easy walkability. We will also be providing shuttle busses to and from the venue. Meet in the Citron Ballroom Foyer (near the conference registration desk) to be directed to the busses. Busses will depart beginning at 5:40 p.m. and will return at 8:00 p.m.



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CONFERENCE PROGRAM

FRIDAY, JUNE 8

7:30 A.M. - 11:00 A.M.

REGISTRATION (Citron Registration)

7:30 - 8:30 A.M.

BREAKFAST (Citron North/Center)

8:30 - 9:20 A.M.

UNCLAIMED PROPERTY TRACKS (UP PROGRAMS SESSION 10, UP LEGAL TRACK SESSION 1)

Unclaimed Property Programs (Pindo)

CPE Field of Study:
Communications & Marketing

Evaluating Outreach and Earned Media: Learn how to track and measure the effectiveness and impact of unclaimed property outreach efforts to stay compelling and relevant.

- Paris Ervin, Director of Communications, Illinois Treasury
- Benno C. Schmidt III, Media Director, Verus Analytics, LLC

Unclaimed Property Legal Track (Session 1) (Sago 1&2)

CPE Field of Study:
Specialized Knowledge

RUUPA from the Trenches: No uniform act survives contact with state legislatures. What are the changes to the Uniform Law Commission's Revised Uniform Unclaimed Property Act (RUUPA) that states are entertaining or passing? This is a technical session for attorneys representing unclaimed property programs to discuss specific amendments requested by interested parties. Examples include pre-need funeral and cemetery trusts, competing definitions for stored value cards and gift cards, life insurance provisions when the state has a DMF matching law, etc.

Moderator: Lynden Lyman, Esq., Executive Consultant, Kelmar Associates, LLC

- Michael K. Green, Esq., Assistant Attorney General, Utah Attorney General's Office
- G. Allen Mayer, General Counsel, Esq., Illinois Treasury
- Celeste Monahan, Unclaimed Property Administrator, Washington State Department of Revenue

8:30 - 10:30 A.M.

ABLE TRACK SESSION 10

ABLE Savings Programs (Citron Ballroom East)

CPE Field of Study:
Finance

ABLE State of the States: Hear from your colleagues around the country as they share their experience in the operation, administration and marketing of ABLE plans. Find out how state legislatures are creating incentives for people to use the plans and learn about the different investment options and ways that plan participants are using their ABLE account. The results of the ABLE State of the States Survey will be used during this session.

Moderator: Kathleen McGrath, Founder, KF McGrath LLC

9:00 A.M. - 12:00 P.M.

PORTFOLIO MANAGERS WORKSHOP

(Sunburst)

The Portfolio Manager's Workshop discusses issues that impact state fund managers across the country (some of previous year's topics include custodians, repo docs, accounting systems, 2a7 reform). This closed session for Portfolio Managers and Treasurers provides an open and honest discussion on topics that are impacting states. We invite all Treasurers and relevant staff to join us for this extremely beneficial networking session to discuss operations and best practices with their peers.

9:20 - 9:30 A.M.

BREAK (Meyer Foyer & Pindo Foyer)

9:30 - 10:45 A.M.

UNCLAIMED PROPERTY TRACKS (UP PROGRAMS SESSION 11, UP LEGAL TRACK SESSION 2)

Unclaimed Property Programs (Pindo)

CPE Field of Study:
Specialized Knowledge

Best Practices for Managing Third-Party Examinations: An experienced panel will provide proven and systematic procedures to maximize these resources.

Moderator: Alexandria Ford, Paralegal, West Virginia State Treasury

- Matthew Angus, Audit Manager, Texas Comptroller of Public Accounts
- Scott Healy, Audit Manager, Utah Treasury

Unclaimed Property Legal Track (Sago 1&2)

CPE Field of Study:
Specialized Knowledge

What's Wrong with the ABA's Draft Model Unclaimed Property Act: Speakers will discuss specific provisions of the Draft Model Unclaimed Property Act of the American Bar Association's Business Law Section's Subcommittee on Unclaimed Property and why they were rejected by the Uniform Law Commission and NAUPA.

Moderator: G. Allen Mayer, Esq., General Counsel, Illinois Treasury

- Tim Cullen, Esq., Associate General Counsel, Kelmar Associates, LLC
- James E. Hartley, Esq., Chief Executive Officer, Verus Analytics LLC

10:30 A.M. - 12:00 P.M. ABLE TRACK SESSION 11	
<p>ABLE Savings Programs (Citron Ballroom East)</p> <p>CPE Field of Study: Finance</p>	<p>You've Got a (New) Friend in Me: Peer-to-Peer Mentoring: Some of us are experts in running savings plans. Some are experts on the disability community. Some poor souls are experts in compliance. Whatever it is you know, there's someone on this panel who can help you learn what you don't know. This networking session will pair you up with someone who is an expert in either communications, disabilities, outreach, government operations, financial side of plans and compliance. Now's the perfect time to ask that question you didn't want to ask in front of everyone. Ask, discuss and brainstorm to your heart's desire.</p> <p>Moderator: Kaellen Hessel, Advocacy/Outreach Manager, Oregon ABLE Savings Plan/OregonSaves</p>
10:45 - 11:00 A.M. BREAK (Meyer Foyer & Pindo Foyer)	
11:00 - 11:50 A.M. UNCLAIMED PROPERTY TRACKS (UP PROGRAMS SESSION 12, UP LEGAL TRACK SESSION 3)	
<p>Unclaimed Property Programs (Pindo)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>What is NAUPA 3? Join the NAUPA leaders to discuss the ongoing NAUPA Standard File Format Reengineering Project and how it will affect every state unclaimed property program and holder.</p> <p>Moderator: John Gabriel, Director of Unclaimed Property, Tennessee Treasury</p> <ul style="list-style-type: none"> Ken Wagers MT, Vice President, Client Information Services, Kelmar Associates
<p>Unclaimed Property Legal Track (Sago 1&2)</p> <p>CPE Field of Study: Specialized Knowledge</p>	<p>Alternatives to Audits: To bring more holders into compliance on multi-state unclaimed property examinations, states are using programs like Voluntary Disclosure Agreements (VDAs), auditor-assisted self-audits, and other alternatives. The panel will discuss how these alternatives work and what the legal implications are for both holders and state unclaimed property programs.</p> <p>Moderator: Jack Stollsteimer, Esq., Deputy Treasurer for Consumer Programs, Pennsylvania Treasury</p> <ul style="list-style-type: none"> Joseph Carr, Tax Partner, National Unclaimed Property and SALT, BDO United States Jeremy D. Katz, Partner, Audit Services U.S., LLC Alison J. Iavarone, CFE, CPA-NY, CGMA, Unclaimed Property Voluntary Disclosure Agreement Administrator, Delaware Department of State
End of Conference	

CONTINUING PROFESSIONAL EDUCATION

Learning Objectives

At the conclusion of this conference, participants will be able to:

- Recount changes to the roles and responsibilities of state treasurers.
- Identify and discuss current issues and best practices for debt management, banking, cash management and investments.
- Apply practical information learned through case studies from peer offices and organizations as it relates to unclaimed property.
- Discuss state government financial management as it relates to the broader national fiscal outlook for the nation.
- Interact with financial literacy experts from around the nation to identify and formulate strategies to educate citizens on money management issues.

Level of Knowledge: Overview

Education or Experience Prerequisite: No prerequisites are required.

Advanced Preparation: No advanced preparation required.

Delivery Method: Group Live. All sessions include Q&A opportunities.

Attendance Requirements: In order to obtain CPE credit for this event, participants must submit attendance verification codes provided during each session.

CPE Credits: The following CPE credits will be offered:

- ABLE Savings Plans Track: Up to 16.5
- Banking, Cash Management & Investments Track: Up to 13.5
- College Savings Plans Track: Up to 15.5
- Financial Education & Empowerment Track: Up to 13.5
- State Debt Management Track: Up to 13.5
- Unclaimed Property Programs Track: Up to 17
- Unclaimed Property Legal Track: Up to 3.5



The National Association of State Treasurers is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

Questions?

Questions about cancellations or administrative policies may be directed to Kathleen Young at (859) 276-1193 or kyoung@nasact.org.

ABOUT NAST

The **National Association of State Treasurers** was founded in 1976 to provide a forum for state treasurers to share information and learn from each other. NAST seeks to provide advocacy and support that enables member states to pursue and administer sound financial policies and programs benefiting the citizens of the nation.

Membership is composed of all state treasurers or state finance officials with comparable responsibilities from the United States, its commonwealths, territories, and the District of Columbia. The private sector is represented through the Corporate Affiliate Program that was established to build professional relationships and foster cooperation between the public and private sectors.

The association serves its members through educational conferences and webinars, a variety of working groups, policy advocacy and publications that provide information about developments in public finance.

NAST AFFILIATES

COLLEGE SAVINGS PLANS NETWORK (CSPN)

The College Savings Plans Network is a network of officials who administer Section 529 qualified tuition programs and are dedicated to enhancing the communication, cooperation and effective administration among the plans. The Network seeks to influence the setting of national policy affecting the Section 529 qualified tuition plans and those saving for college, and to ensure that Section 529 qualified tuition plans remain a leading choice for families to save for college.

NATIONAL ASSOCIATION OF UNCLAIMED PROPERTY ADMINISTRATORS (NAUPA)

Founded in 1962, the National Association of Unclaimed Property Administrators (NAUPA) facilitates collaboration among administrators in their efforts to reunite unclaimed property with the rightful owner. As the foremost authority on unclaimed property, NAUPA leads a coalition of administrators to reunite all recovered unclaimed property with the rightful owner. Members represent all states, the District of Columbia, the Commonwealth of Puerto Rico, several Canadian provinces, and Kenya.

STATE DEBT MANAGEMENT NETWORK (SDMN)

The State Debt Management Network represents state officials and other persons involved in the issuance, management, and/or oversight of public debt. SDMN provides assistance, shares information and promotes professional relationships in the large state debt community while providing educational and professional development opportunities for its membership.

NAST COMMITTEES

ABLE Committee

This committee tracks federal legislative and regulatory activity related to ABLE programs and provides members with advocacy positions and updates on these issues.

Banking and Cash Management Committee

This committee provides leadership on all banking related issues that impact State Treasuries and also coordinates the Banking & Cash Management Track at the Treasury Management Training Symposium.

Financial Education and Empowerment Committee

This committee tracks the financial literacy programs in all states and provides assistance to states on how to broaden and promote those programs.

Legislative Committee

This committee tracks any legislative issues in Congress and the Administration that is relevant to state treasury departments. They provide regular updates on these issues to the membership while also publishing advocacy documents for all to use as references.

Pension and Trust Investment Committee

This committee provides guidance and education on pension related issues to members.

Program Committee

Chaired by the NAST Senior Vice President, the program committee works with the Corporate Affiliate Advisory Board to identify and develop plenary sessions and keynote addresses at NAST's conference offerings.

Taxation Committee

This committee tracks federal legislative activity related to changes in the tax code that would impact state treasury operations or state finances in general. The committee provides members with updates on these issues and develops advocacy positions and supporting materials in the event the membership need to take action.



Roger W. Ferguson, Jr., is President and Chief Executive Officer of TIAA, the leading provider of retirement services in the academic, research, medical, and cultural fields and a Fortune 100 financial services organization.

Mr. Ferguson is the former Vice Chairman of the Board of Governors of the U.S. Federal

Reserve System. He represented the Federal Reserve on several international policy groups and served on key Federal Reserve System committees, including Payment System Oversight, Reserve Bank Operations, and Supervision and Regulation. As the only Governor in Washington, D.C. on 9/11, he led the Fed's initial response to the terrorist attacks, taking actions that kept the U.S. financial system functioning while reassuring the global financial community that the U.S. economy would not be paralyzed.

Prior to joining TIAA in April 2008, Mr. Ferguson was head of financial services for Swiss Re, Chairman of Swiss Re America Holding Corporation, and a member of the company's executive committee. From 1984 to 1997, he was an Associate and Partner at McKinsey & Company. He began his career as an attorney at the New York City office of Davis Polk & Wardwell.

Mr. Ferguson is a member of the Smithsonian Institution's Board of Regents and serves on the New York State Insurance Advisory Board. He is a fellow of the American Academy of Arts & Sciences and co-chairs its Commission on the Future of Undergraduate Education. He serves on the boards of Alphabet, Inc.; General Mills, Inc.; and International Flavors & Fragrances, Inc.

He is Chairman of The Conference Board and serves on the boards of the Institute for Advanced Study and Memorial Sloan Kettering Cancer Center. He is a fellow of the American Philosophical Society and a member of the Economic Club of New York, the Council on Foreign Relations, and the Group of Thirty.

Mr. Ferguson served on President Obama's Council on Jobs and Competitiveness as well as its predecessor, the Economic Recovery Advisory Board, and he co-chaired the National Academy of Sciences' Committee on the Long-Run Macroeconomic Effects of the Aging U.S. Population.

Mr. Ferguson holds a B.A., J.D., and a Ph.D. in economics, all from Harvard University.



Jeff James serves as vice president and general manager of Disney Institute, which is the professional development and business advisory arm of Walt Disney Parks and Resorts. A 20 plus year veteran of The Walt Disney Company, Jeff is an expert in the company's successful core competencies and

values. Based in Orlando, Florida, he oversees a global team of Disney subject-matter experts who engage with clients by sharing Disney business insights focused on service, leadership and employee engagement.

Most recently, Jeff served as vice president and managing director for Disney Destinations International in London. He led the marketing, sales, public relations and finance efforts across the United Kingdom and Ireland for the portfolio of assets within Walt Disney Parks and Resorts.

Prior to his role in London, Jeff was the vice president of Travel Industry Sales for Walt Disney Parks and Resorts. He originally led the sales team responsible for Disney Cruise Line, and was instrumental in supporting the team when it expanded to include Disneyland® and Walt Disney World®.

Jeff began his Disney career in 1996 and played a pivotal role as one of the founding executives of Disney Cruise Line. He served as the director of sales, where he provided executive leadership as the cruise line vastly expanded its domestic and European itineraries and added two new ships to its fleet.

Jeff has a bachelor's degree in business and commercial recreation from the University of Colorado. He also has several professional licenses in the sales, insurance and real estate fields.

About Disney Institute:

For over 30 years, Disney Institute has helped business professionals learn the Disney approach to customer experience. It's rooted in time-tested business insights on leadership, employee engagement and service that create a culture of excellence at Walt Disney Parks and Resorts. Whether it's individuals, teams or entire organizations, Disney Institute helps people around the world apply these business insights to improve their own customer experiences.

2018

ANNUAL CONFERENCE

September 29-October 3

The Scottsdale Resort at McCormick Ranch — Scottsdale, Arizona

2019

LEGISLATIVE CONFERENCE

February 9-11

Mayflower Hotel — Washington, DC

TREASURY MANAGEMENT TRAINING SYMPOSIUM

May 22-24

Omni Hotel — Providence, Rhode Island

NATIONAL INSTITUTE OF PUBLIC FINANCE

July 14-17

Pepperdine University — Malibu, CA

ANNUAL CONFERENCE

October 7-9

The Naples Grande Beach Resort — Naples, Florida



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