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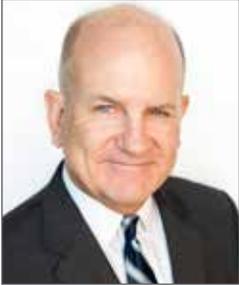


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# 2019 NAST Legislative Conference



Welcome to the 2019 National Association of State Treasurers (NAST) Legislative Conference, and a special welcome to our new Treasurers!

I am deeply honored to serve as NAST President this year. NAST has been and continues to be essential to me in my former role as chief deputy treasurer and now as the Treasurer of Utah. As members of NAST, we realize innumerable benefits, including advocacy support, tailored professional education, and essential opportunities for networking. I have gotten far more out of NAST than I could ever give back, and I am confident that your experience is, or will be, like mine.

2018 was an eventful and productive year for NAST, and I would like to thank Treasurer Beth Pearce for her leadership as NAST's 2018 president. She is the consummate mentor and role model, given her steady hand, subject matter expertise, and collegial spirit. Thank you, Beth, for your stewardship, friendship, and vision.

Coming together for our Legislative Conference provides us an opportunity to reflect upon some of our recent policy-related activities. We had many victories during the tax debate in late 2017, including the protection of tax-exempt municipal bonds and the expansion of 529 and the ABLÉ programs. While we were not as successful on advance refundings, it was at our 2018 Legislative Conference that legislation to reestablish advance refundings was announced. We are working with a broad coalition to ensure that legislation receives the consideration it deserves. Due in part to NAST's years-long advocacy efforts, high-grade municipal bonds were rightly classified as HQLA.

As an integral component of its long-range strategic plan, NAST significantly raised its advocacy profile by working to reestablish the group known as the "Financial Four" – NASBO, NASACT, GFOA, and NAST. On top of that, the Financial Four is now part of the Big 7, elevating NAST's voice on financial matters that impact the members of associations, such as the National Governors Association and National Association of Counties, among others. NAST's bipartisan nature and the subject matter expertise we bring to bear to policy issues gives us significant credibility among members of Congress, their staff, and executive branch agencies. More than ever before, we are seen as the go-to resource on public finance.

With the new Congress underway, NAST is actively working to promote our key issues as well as respond to legislative proposals that impact our offices and state finances. These include financial literacy, planning, and preparedness; tax favored programs (such as 529s and ABLÉ); and protecting and enhancing financing mechanisms for much-needed investments in infrastructure.

NAST's Legislative Conference provides a valuable opportunity for us to continue developing and building upon the sound fiscal policies and programs we've promoted for years. This year's Legislative Conference includes a strong slate of programs and events, allowing us all the opportunity to interact with Congressional leaders as we continue to advocate for issues important to our membership. Your direct and ongoing engagement with members of your Congressional delegation, both while in D.C. and in your state, is critical so that we have a direct line to your policymakers when we need to act.

Thank you to all who made this conference happen, including the leadership of the Executive Committee, the NAST Networks, the Program and standing committees, our Corporate Affiliates, and the NAST staff. Conferences like this take many months to put together, and I would be remiss if I did not express my appreciation for that hard work.

Welcome to Washington, DC, and I look forward to seeing you all throughout the year at various NAST events. For those of you who are new to NAST, please engage with your colleagues here and start to build relationships that will be incredibly valuable during your tenure as State Treasurer.

A handwritten signature in black ink, appearing to read "David Damschen", with a long, sweeping underline.

David Damschen  
NAST President  
Utah State Treasurer

## CONFERENCE APP, WIFI & SOCIAL MEDIA

### Interact with the NAST Legislative 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 and committees, share pictures to social media, and more.

Visit [www.nast.org/app](http://www.nast.org/app)  
on your computer or mobile device!

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Access your profile to use the app features and start competing in the leaderboards

- **Learn** – Add the events you want to attend to your personalized schedule. Export them to your Outlook 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. Have your opinion heard

### WIFI Access

Thanks to our generous sponsor Upromise, wireless internet access is provided in all meeting rooms.

**Network:** NAST Annual Conference

**Password:** Upromise4u



### Photography

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.

### Professional Pictures

We know you are busy and getting an updated headshot is probably on your to-do list. Instead of the usual conference swag, NAST has hired a photographer to take professional headshots during the event. Please stop by the pop-up photo gallery at the Mayflower Hotel to take your complimentary picture while attending the Legislative Conference. The photographer will be available throughout the day on Monday.

### Social Media

Follow NAST and this conference:



[www.nast.org](http://www.nast.org)



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## SPONSOR ACKNOWLEDGEMENTS

NAST wishes to acknowledge the generosity of the sponsors of the 2019 NAST Legislative Conference.

### New Treasurers Lunch

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### Monday Keynote



### Wifi Access

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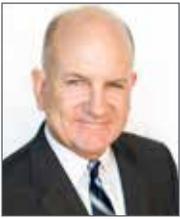


### Bronze



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California



**CORPORATE AFFILIATE BOARD REPRESENTATIVE**  
**Steve Kantor**  
Regional Managing Director  
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## CONFERENCE AGENDA

### SUNDAY, FEBRUARY 10 *Dress for the Day: Business Casual*

10:00 A.M. - 7:00 P.M.

CONFERENCE REGISTRATION (State Foyer)

11:00 - 11:45 A.M.

PROGRAM COMMITTEE (State Room)

12:05 - 12:45 P.M.

FINANCIAL EDUCATION & EMPOWERMENT COMMITTEE MEETING  
(State Room)

PENSION COMMITTEE (East Room)

12:45 - 1:00 P.M.

BREAK (State & East Rooms)

1:00 - 1:30 P.M.

NAST FOUNDATION BOARD MEETING (State Room)

1:00 - 1:45 P.M.

ABLE COMMITTEE MEETING (East Room)

1:30 - 2:45 P.M.

NIPF BOARD MEETING (State Room)

1:45 - 2:45 P.M.

BANKING & CASH MANAGEMENT COMMITTEE MEETING (East Room)

CSPN FEDERAL INITIATIVES COMMITTEE MEETING (Chinese Ballroom)

2:40 - 3:00 P.M.

BREAK (State & East Rooms)

3:00 - 3:45 P.M.

CORPORATE AFFILIATE ADVISORY BOARD MEETING (East Room)

3:15 - 4:00 P.M.

LEGISLATIVE COMMITTEE MEETING (State Room)

4:00 - 5:00 P.M.

EXECUTIVE COMMITTEE MEETING (State Room)

6:00 - 8:00 P.M.

WELCOME & NETWORKING RECEPTION  
(Palm Court Ballroom)

Join your colleagues in the Palm Court Ballroom at the Mayflower Hotel for this networking event and kick off to the conference.

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# CONFERENCE AGENDA

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## MONDAY, FEBRUARY 11 *Dress for the Day: Business*

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7:30 A.M. - 4:00 P.M.

REGISTRATION (Grand Foyer)

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7:45 - 8:30 A.M.

NETWORKING BREAKFAST (East Room)

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8:30 - 9:00 A.M.

PRESIDENT'S WELCOME REMARKS (Grand Ballroom)

- Treasurer David Damschen (UT), NAST President
- 

9:00 - 10:00 A.M.

PLENARY SESSION (Grand Ballroom)

### Federal Banking Policy and Why it Matters to States

New laws and regulatory proposals regarding federal banking issues set the stage for this panel. Topics are wide ranging and may shift in the weeks (or even days) leading up to the conference as new members join Congress and Committees are reorganized. Expect to hear about the implementation of the Economic Growth, Regulatory Relief and Consumer Protection Act signed into law last spring; various proposals before the Federal Reserve such as interbank settlements; and any proposed changes to Dodd-Frank.

Moderator: Treasurer David Damschen (UT), NAST President

- Bill Collins, Head of Government Banking, U.S. Bank
  - Ernie Jolly, Deputy Chief of Staff & Legislative Director, Office of Congressman Gregory W. Meeks (NY-5)
  - Peter Knight, Director, Government Relations, Federal Home Loan Bank of Pittsburgh
- 

10:00 - 10:15 A.M.

BREAK (Grand Foyer)

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10:15 - 11:15 A.M.

PLENARY SESSION (Grand Ballroom)

### Municipal Finance – New Developments and What to Expect in 2019

Fiscal, monetary, and other legislative policy issues converged on the Municipal Finance Markets in 2018. During this panel discussion, respondents will discuss the developments of 2018 and what to expect in 2019. Topics to be explored include: noticeable impacts on states from post-tax law reforms; elimination of advance refundings and changes to the refinancing approach; and the transition from LIBOR to SOFR.

Moderator: Treasurer Manju Ganeriwala (VA)

- Sally Bednar, Managing Director, Head of Capital Markets Group, Wells Fargo
  - Anne Burger Entekin, Managing Director, Hilltop Securities
  - Meghan Burke, Member/Chair, Public Finance Practice & Chair, Education Practice, Mintz Levin, Cohn, Ferris, Glovsky and Popeo
  - Mark Paris, Chief Investment Officer, Head of Municipal Strategies, Invesco
- 

11:15 - 11:30 A.M.

BREAK (Grand Foyer)

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11:30 A.M. - 12:30 P.M.

PLENARY SESSION (Grand Ballroom)

### Fraud Mitigation and Identity Management

Is your state doing enough to secure your IT systems and protect the identity of your constituents? State systems run the risk of pension account-take over, ID fraud in property claims, and entitlement ID theft. The public sector is starting to receive the same level of focus found in other financial service industries, thus state agencies need to create a culture of risk mitigation. This panel will discuss ID verification, device assessments, fraud detection models, and portfolio monitoring.

Moderator: Treasurer Sarah Godlewski (WI)

- JJ Harkema, Government Identity Consultant, Public Sector, Experian
  - Adam Malone, Principle, Cybersecurity, EY
  - Deborah Snyder, Chief Information Security Officer (NY)
- 

12:30 - 1:45 P.M.

LUNCH WITH KEYNOTE ADDRESS (Grand Ballroom)

Introduction: Treasurer Kelly Mitchell (IN), NAST Secretary-Treasurer

**KEYNOTE SPEAKER:** Michelle Singletary, Personal Finance Columnist, Washington Post

(Bio on page 11)



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2:00 - 2:30 P.M. & 2:45 - 3:15 P.M.

FEDERAL & REGULATORY AGENCY FOCUS GROUPS

**Governmental Accounting Standards Board (GASB)** (Pennsylvania)

**Municipal Securities Rulemaking Board (MSRB)** (Rhode Island)

**Consumer Financial Protection Bureau (CFPB)** (North Carolina)

**The Thirty Percent Coalition** (Georgia)

Representatives from three Federal and Regulatory agencies are hosting in-depth focus groups. Each discussion is repeated twice so attendees can attend more than one meeting.

In addition, representatives from the Thirty Percent Coalition will provide a forum for Treasury officials to discuss what they are asking corporations and their boards when reflecting on gender, racial and ethnic diversity.

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2:00 - 4:00 P.M. **Meet at 1:20 p.m. in the Grand Foyer for transportation**  
OFFSITE FOCUS GROUP

**National Council on Disability's Inter-Agency Forum on ABLÉ**

ABLE administrators and staff will have the unique opportunity to meet with the National Council on Disability and other federal agencies to participate in this inter-agency forum on ABLÉ plans. Agencies will provide an overview of how they are working to incorporate ABLÉ into the services they provide individuals with disabilities. Likewise, ABLÉ administrators will provide an overview of successes and challenges that ABLÉ plan participants are experiencing when coordinating ABLÉ benefits with federal disability services.

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3:15 - 3:30 P.M.

BREAK (Second Floor Foyer)

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**3:30 - 4:30 P.M.**

**PEER-TO-PEER ROUNDTABLES**

**Chief of Staff/Deputy Treasurers** (Pennsylvania)

**Legislative and Policy Directors/Counsel** (Georgia)

**529 Plan Personnel** (Rhode Island)

**Public Information Officers** (North Carolina)

You asked, we provided. Job alikes in Treasury and related offices asked for more time to meet with each other and discuss pressing issues relevant to your job. Please select a title most closely related to your position to attend and join the conversation. There is no formal agenda, these are peer-led roundtables. Bring your issues for these off-the-record conversations.

**3:30 - 4:30 P.M.**

**TOPICAL ROUNDTABLE** (Grand Ballroom)

**State-sponsored Retirement Initiatives**

Join this Treasurer-led discussion around opportunities for multi-state collaborations expanding retirement savings programs. While many states continue to establish their own programs, participants of this roundtable will explore collaborative arrangements, similar to the ABLE programs, to help achieve scale and keep costs as low as possible.

**6:00 - 8:30 P.M.**

**BUFFET DINNER & ADVENTURE AT THE MANSION ON O STREET**

Join your colleagues for an exciting evening at the Mansion on O Street – voted one of the top five venues to explore by the Smithsonian. With over 100 rooms and 70 secret doors, it is one of the most unique properties in the world.

The Mansion is a 10-minute walk from the hotel. For those who prefer not to walk, meet near the conference registration desk at 5:30 to begin boarding buses for the short ride over. Buses will return beginning at 8:30 p.m.

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# CONFERENCE AGENDA

## TUESDAY, FEBRUARY 12 *Dress for the Day: Business*

**7:15 - 10:00 A.M.**

REGISTRATION (Grand Foyer)

**7:30 - 8:30 A.M.**

NETWORKING BREAKFAST (Grand Ballroom)

**8:30 - 9:00 A.M.**

KEYNOTE ADDRESS (Grand Ballroom)

Introduction: Treasurer Deborah Goldberg (MA), NAST Senior Vice President

**KEYNOTE SPEAKER:** Representative Richard Neal (D-MA), Chairman of the House Ways & Means Committee (Bio on page 12)

**9:15 - 10:00 A.M.**

TRANSPORTATION TO CAPITOL HILL

Meet at the conference registration desk to be escorted to the buses. There is a short walk from the bus to the building and attendees will need to go through security, but may keep shoes on and carry liquids. If possible, please check your suitcase at the hotel for pick up later in the day.

**10:00 - 10:30 A.M.**

ADVOCACY PRIMER (Rayburn 2043 & 2044)

Hear from Williams and Jensen, NAST's advocacy team, on how to advocate for important federal and state issues in DC. Whether you are a seasoned veteran of Hill meetings or this is your first time, this session will be helpful for your appointments.

**10:30 A.M. - 12:30 P.M.**

SPEAKER SERIES WITH MEMBERS OF CONGRESS

(Rayburn 2043 & 2044)

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.

**12:00 - 1:00 P.M.**

BOX LUNCHESES PROVIDED (Rayburn 2043 & 2044)

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 P.M.**

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.



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Monday, February 11



**Michelle Singletary** writes the nationally syndicated personal finance column "The Color of Money," which appears in *The Washington Post* on Wednesdays and Sundays.

Her award-winning column is syndicated by The Washington Post Writers Group and is carried in dozens of newspapers nationwide. She has written three personal finance books, including her latest, *The 21-Day Financial Fast: Your Path to Financial*

*Peace and Freedom*. Singletary was the financial expert for "The Revolution," a daytime program on ABC. For two years, she was host of her own national television program, "Singletary Says," on TV One. She is a frequent contributor to various NPR programs and has appeared on national talk shows and television networks, including "Oprah," NBC's "Today," "The Early Show on CBS" and CNN.

In her spare time, Singletary is the director of a ministry she founded at her church, in which women and men volunteer to

mentor others who are having financial challenges. As part of this ministry, she and her husband also volunteer to teach financial literacy to prison inmates.

She is a graduate of the University of Maryland at College Park. She has received the Distinguished Alumni Award from Johns Hopkins University, where she earned a master's degree in business and management.

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## KEYNOTE SPEAKER BIO

**Tuesday, February 12**



**Richard Neal** was first elected to the United States House of Representatives in 1988. Since January 2019, he is the Chairman of the powerful tax-writing Ways and Means Committee.

Congressman Neal is the dean of both the Massachusetts Delegation and the New England Congressional Delegation. He is a long-time guest lecturer at the University of Massachusetts in Amherst, and a Trustee

at Mount Holyoke College. He is a National Trustee of John F. Kennedy Library in Boston. He served as the Mayor of the City of Springfield from 1984 to 1988, and was highlighted in Newsweek Magazine for his many accomplishments during that time.

Congressman Neal has been a lead sponsor of legislation to prevent American companies from moving offshore to avoid paying U.S. taxes. He has sponsored legislation that would increase the national savings rate by encouraging the use of individual retirement accounts, and has worked to make health care and tuition expenses tax deductible for middle class

people. He successfully led the charge to eliminate the Alternative Minimum Tax (AMT) for middle-class families in America. He has a long legislative history of fighting to preserve and protect Medicare and Social Security.

Congressman Neal is an At-Large Whip for the House Democrats. He is a co-chairman of the New England Congressional Caucus, where he advocates for the unique regional interests of the six New England States. Congressman Neal is the Democratic Leader of the Friends of Ireland Caucus.

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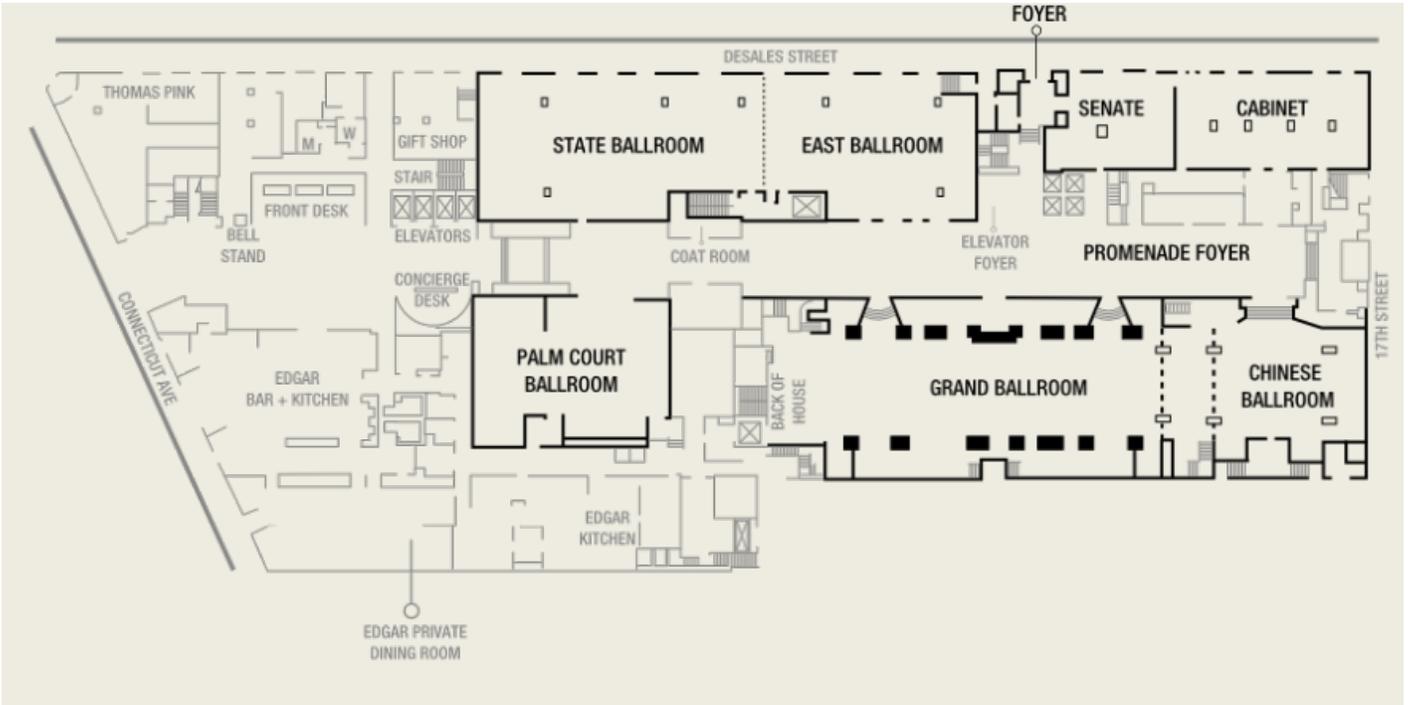
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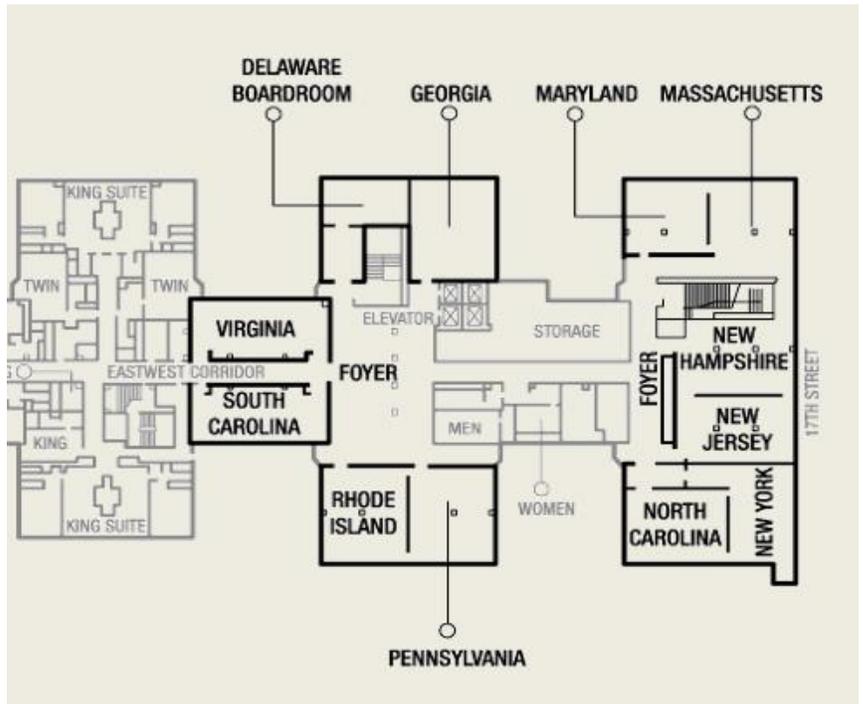
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### Second Floor





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## 2019

### TREASURY MANAGEMENT TRAINING SYMPOSIUM

May 21-24

Omni Providence Hotel — Providence, Rhode Island

### NATIONAL INSTITUTE OF PUBLIC FINANCE

July 14-17

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### ANNUAL CONFERENCE

October 6-9

Naples Grande Beach Resort — Naples, Florida

## 2020

### LEGISLATIVE CONFERENCE

February 9-11

The Mayflower Hotel — Washington, DC

### TREASURY MANAGEMENT TRAINING SYMPOSIUM

June 9-12

Hilton Portland Downtown — Portland, Oregon

### ANNUAL CONFERENCE

September 13-16

Intercontinental San Diego — San Diego, California

## 2021

### LEGISLATIVE CONFERENCE

February 7-9

Fairmont Georgetown — Washington, DC

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