



Planning to submit a proposal for TMTS 2023? This document will help you prepare before you submit a proposal in the online system. This PDF is for informational purposes only to help you prepare. NAST is seeking diverse panels, not keynote speakers. **Official submissions must be made online at [www.nast.org/proposals](http://www.nast.org/proposals) by January 27th, 2023. For more information about TMTS, [click here](#).**

Step 1 - Select one of the following seven Learning Themes/Tracks (see below for suggested topics for each track):

- 529 College Savings Plans
- ABLE Savings Plans
- Banking & Cash Management
- Financial Education & Empowerment
- Innovations & Trends in the Treasury
- State Debt Issuance
- Unclaimed Property

Step 2 – Then fill in the following information in the required fields:

- Catchy session title (No more than 10 words)
- Session description and learning objectives (Between 40-80 words)
- Skill level (beginner, intermediate or mastery) and length of session
- Description of audience engagement, such as group discussion, table activity, and/or polling.
- Facilitator's information (This person may or may not be a speaker, but is the point of contact with whom NAST will communicate about this session.)
- Suggested or confirmed speakers' information. NAST strives for diverse panels of Treasurers/treasury and related office staff, and employees from corporations/academia/NGOs.

### **Suggested Track Topics:**

To help you plan your submissions for TMTS, below are some topics that NAST members have identified as areas where specific training is needed. These topics are not all-inclusive, but have been identified as priorities for the networks and committees that are developing the program for 2023.

## **529 College Savings Plans**

- Trends / Future of Higher Education and the impact on 529 plans
- Investments: offerings/investment trends/challenges in the current environment
- Marketing/outreach
- Legislative & regulatory updates
- Technology: trends/advances/opportunities
- Administering 529s: state perspectives

## **ABLE Savings Plans**

- Legislative and regulatory updates
- Investment strategies, governance and fiduciary responsibilities
- Outreach to families, eligible participants, social services
- Marketing, branding and messaging
- Other topics of interest to ABLE Administrators

## **Banking & Cash Management**

- Payment innovations
- Collateral/ Investment management
- Treasury operations
- Financial fraud
- Economic update
- Regulations
- Cash forecasting
- ESG and sustainable investing

## **Financial Education & Empowerment**

We are seeking a series of linked sessions focusing on best practices of financial education at the treasury that includes the following:

- Successes and outreach strategies for statewide financial education programs for students, children and adults (both in person and online)
- Model legislation. Topics to include: How to pass a financial education bill in your state, What is a persuasive argument for legislators? and What are the common pitfalls?
- How to establish an office of economic empowerment and/or financial empowerment commission.
- Ancillary and easy financial education ideas that promote financial empowerment, such as awards and programming.

## **Innovations & Trends in the Treasury**

- Technology and security, fraud, data privacy, AI
- Treasury management systems
- Operational issues, such as continuity of business operations, governance, HR/employment
- Workforce development, employee training
- Intergenerational workplace issues
- Retirement security
- Leadership and governance

## **Unclaimed Property**

- Legal Trends and Legislation
- Fraud Prevention and Detection
- Technology Innovations
- Audits
- Claims Processing
- Marketing and Communications
- Compliance and Reporting
- Virtual Currency and Emerging Property Types
- Finders, Remnant Assets, and Other Claiming Complexities

## **State Debt Issuance**

- Economic update
- Bonds 101 – High level overview of municipal bond issuance, targeting people relatively new to the field
- Disclosure 101 – Review of the obligations, risks, and requirements related to municipal disclosure, especially in connection with the preparation of offering documents, providing continuing disclosure, filing material event notices, and speaking to the market
- Bonds 201 – Strategies for managing new money financings, including commercial paper, variable rate, and fixed rate obligations
- ESG's Impact on Disclosure and Ratings
- ESG Labels – What ESG related labels are being used and what are the cost, benefits, and risks of such labels?
- Transportation Bond Financings – TIFIA, GARVEE, Toll Bonds and other strategies – a case study review of recent innovative transportation financings
- Federal Financing Strategies – TIFIA, GARVEE
- Forecasting – Forecasts are an important part of long-term planning. What risk mitigation strategies and approaches can be used to maximize the benefit of forecasts in long term planning, while offsetting the risks?
- Ratings – What are the key metrics that factor into a state issuer's credit rating and what strategies can be implemented to improve a rating?
- Hiring - The challenge of finding talent, and analyzing the impact of labor shortage on government and the muni industry
- Case Study Review – a group review and discussion of select interesting, innovative or otherwise relevant financings