



Planning to submit a proposal, speaker or topic for TMTS 2024 in Pittsburgh? This document will help you prepare before you submit in the online system. This PDF is for informational purposes to help you prepare your submission. NAST is seeking diverse panels for each track, as well as keynote speakers and plenary session topics, that are applicable to all attendees.

**Official submissions must be made online [using this link](#) by February 2, 2024.**

Step 1 - Once on the CFP application page, select one of the following tracks (see below for suggested topics for each track):

- 529 College Savings Plans
- ABLE Savings Plans
- Banking & Cash Management
- Financial Education & Empowerment
- Innovations & Technology in the Treasury
- State Debt Issuance
- Unclaimed Property
- Other - Keynote speaker or plenary session topics

Step 2 – 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)
- Type of format for session (i.e. panel session, demo, case study, facilitator-led discussion)
- 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 2024.

### **529 College Savings Plans (can include but not limited to)**

- **Innovative Plan & Investment Design:** Explore cutting-edge approaches to 529 plan design that address the evolving needs of beneficiaries and account owners.
- **Technology and Digital Transformation:** Showcase how technology is reshaping the 529 landscape, from digital onboarding to personalized investment strategies.
- **Financial Literacy and Education:** Share effective strategies for promoting financial literacy among families, highlighting successful educational initiatives within 529 plans.
- **Marketing and Outreach:** Present innovative marketing campaigns, outreach programs, and community engagement efforts that have successfully increased 529 plan participation.
- **Regulatory and Compliance Updates:** Provide insights into the latest regulatory changes and compliance challenges impacting 529 plans, along with strategies for navigating these changes.
- **Understanding Investor Behavior:** Provide insights - drawing on data analysis, surveys, interviews, or other methods – into investor behavior and savings motivations.

### **ABLE Savings Plans (can include but not limited to)**

- **Investment Strategies, Governance and Fiduciary Duty:** Explore investment strategies for ABLE plan design that address the evolving needs of ABLE account owners and share best practices for ABLE plan governance.
- **Operational Innovations and Challenges:** Showcase operational innovations and strategies and highlight any challenges with potential solutions.
- **Outreach to Families, Eligible Participants, and Other Providers:** Share effective strategies for outreach and community engagement efforts that have increased ABLE plan participation.
- **Marketing, Branding and Financial Literacy:** Present innovative marketing campaigns, branding initiatives, and strategies for promoting financial literacy among families, highlighting successful campaigns or initiatives.
- **Legislative, Regulatory and Compliance Updates:** Provide insights into the latest legislative and regulatory changes and compliance challenges impacting ABLE plans, along with strategies for navigating these changes.

### **Banking & Cash Management**

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

### **Financial Education & Empowerment**

We are seeking a series of sessions focusing on best practices of financial education at the treasury that includes, but are not limited to, 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 & Technology in the Treasury (can include but not limited to)**

- 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, knowledge transfer
- Retirement security
- Leadership, governance, ethics

### **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
- 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
- ESG labels and Impact on disclosure and ratings
- Transportation Bond Financings – TIFIA, GARVEE, Toll Bonds and other strategies – a case study review of recent innovative transportation financings
- 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 and the Future of Work - The challenge of finding talent, and analyzing the impact of labor shortage on government and the muni industry, and what the future may look like for the industry
- Case Study Review – a group review and discussion of select interesting, innovative or otherwise relevant financings
- Investing Tax Exempt Bond Proceeds - Investment strategies for bond proceeds, such as capitalized interest, debt service reserve, refunding escrow, and proceeds, along with related IRS restrictions and arbitrage rebate requirements