



## **Instructions on how to submit a session proposal, speaker, or topic for TMTS 2025 in Baltimore.**

This document will help you prepare to submit your proposal in the online system. NAST is seeking diverse panels for each track, as well as keynote speakers and plenary session topics that are applicable to all attendees. For a complete list of requirements and specifications, please visit the [Call for Proposal webpage](#).

**All submissions must be made online [using this link](#) by January 31, 2025.**

Step 1 - Click on the [submission link](#) and 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 online portal](#). The following are required fields:

- Affirm you have read the “Requirements and Specifications” on the [CFP webpage](#).
- Enter a catchy session title (No more than 10 words).
- Describe the session and learning objectives (Between 40-80 words).
- Select the type of format (i.e. panel session, demo, case study, facilitator-led discussion).
- Select the skill level (beginner, intermediate or mastery).
- Describe the audience engagement, such as group discussion, table activity, and/or polling.
- Enter the 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.)
- Add suggested or confirmed speakers’ information. NAST strives for diverse panels of State Treasurers/treasury and related office staff, and employees from corporations/ academia/NGOs.

### **Suggested Track Topics for Planning Purposes:**

To help you plan your submissions for TMTS, below are topics that NAST members and networks have identified as areas where specific training is needed. These suggested topics are not all-inclusive, but have been identified as priorities when developing the TMTS program for 2025.

## 529 College Savings Plans

CSPN will be celebrating NAST's 50th Anniversary in 2025-26 and will be seeking to incorporate the organization's 2025 theme of "Advocacy in Motion" into our conference program and planning.

CSPN would like sessions celebrating the advancements and changes in the 529 industry over the past 40+ years while also looking forward to what the future holds for 529 plans. Suggested topics can include but not limited to the following:

- **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 (Suggested topics can include but not limited to the following):

- **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. Potential changes to investment strategies to meet the investment and savings needs of those who will be newly eligible.
- **Operational Innovations and Challenges:** Showcase operational innovations and strategies that have improved the customer experience or program growth and discuss any challenges with a proposal of 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. Strategies for marketing to newly eligible audiences in anticipation of implementation of the ABLE Age Adjustment Act.
- **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:

Your proposal should demonstrate how your interactive training on the topics below will equip government treasury professionals with practical strategies. Demonstrate how your program will engage participants through real-world case studies, interactive polling, and dedicated Q&A periods and specify the types of takeaway materials that will be provided to enhance learning and on-the-job application (e.g., templates, research, checklists, samples, etc.).

- **Cash Flow Fundamentals: Modern Treasury Operations & Liquidity Management**  
Improve daily cash flow visibility by understanding your cash position and using modern forecasting techniques, including AI integration. Optimize bank balances by working with agencies and implementing best practices for cash management.

- **Banking Services Evolution: The Changing Payment Landscape**  
The payments landscape is shifting from traditional methods like checks towards real-time payments, digital wallets, and API-driven processing. This evolution necessitates adapting to the decline of checks while embracing technologies like FedNow and contactless payments to shape the future of government payment systems.
- **Banking RFP Excellence: From Selection to Implementation**  
Secure optimal banking services through well-defined RFPs that address essential needs, technology requirements, and robust evaluation methods. This leads to effective contract negotiations and successful implementation planning for improved banking relationships.
- **Securing the Treasury: Fraud Prevention & Cybersecurity in Banking**  
Enhance government banking security by addressing evolving fraud threats with robust cybersecurity measures, secure payment rails, and advanced fraud detection systems. Implement multi-factor authentication and consider insurance and liability implications for comprehensive protection.
- **Maximizing Returns: Strategic Investment of Excess Cash**  
Develop a comprehensive strategy for managing excess cash by defining an investment policy and considering short-term investment options in the current market. Leverage technology tools to optimize yields, track performance, and generate insightful reports.

#### **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? 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.
- Technology and innovation in financial education (digital tools, AI, etc).

#### **Innovations & Technology in the Treasury:**

- Case studies on technology and security, fraud, data privacy, artificial intelligence.
- Implementation of treasury management systems.
- Overview of operational issues, such as continuity of business operations, governance, HR/employment.
- Studies about workforce development, employee training, knowledge transfer.
- In-depth reviews of state-facilitated retirement security programs.
- Overviews of leadership, governance, ethics.

#### **Unclaimed Property:**

- Legal Trends and Legislation
- Fraud Prevention and Detection
- Technology Innovations
- Audits
- Claims Processing and Complexities
- Marketing and Communications

- Compliance and Reporting
- Virtual Currency and Emerging Property Types
- Workforce and Staff Development

**State Debt Issuance:**

- 2025 Economic Update
- Case Study Review – A group review and discussion of select interesting, innovative or otherwise relevant financings that could be a catalyst for idea sharing and problem solving.
- Improving Productivity in the Workplace - Practical uses for AI (how to use chat GPT, or other AI programs to make my life easier), Tips and Tricks to get more out of outlook, Tips and Tricks to get more out of OneNote.
- Federal Debt Levels – Impacts on states. What financing tools may be impacted (SLGS and others)? What should states be doing to prepare?
- 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.
- Transportation Bond Financings – TIFIA, GARVEE, Toll Bonds and other strategies – consider case study review of recent innovative transportation financings.
- Forecasting – 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? How do key benchmarks compare? What strategies can be implemented to improve an issuer’s rating? Are there new rating factors?
- Hiring - The challenge of finding talent, and analyzing the impact of labor shortage on the government and the muni industry.
- Negotiated vs Competitive Bond Issuances – How to determine when to use which one