NATIONAL ASSOCIATION OF STATE TREASURERS

2026 TMTS Conference Program

The complete program including speakers and room locations will be available in the conference app.

Conference Overview

ABLE Savings Plans
Oklahoma Station Ballroom 2-3

Banking & Cash Management
Mistletoe

529 Education Savings Plans
Oklahoma Station Ballroom 4

Communications & Marketing Pathway

Financial Education & Empowerment
Pinon

Innovations & Technology in the Treasury
Route 66

Retirement Security
Automobile Alley C

State Debt Issuance
Automobile Alley A-B

Unclaimed Property
Oklahoma Station Ballroom 6-8

Conference Overview

Monday, June 15

Breakfast
8:00-9:00 AM

Exhibit Hall Open
9:00 AM-8:00 PM
Step into our exhibit hall in Oklahoma Station Ballroom 5 open just on Monday and get hands-on with the newest tools, ideas, and solutions shaping our fields. It's a great way to make valuable connections, discover what's next, and walk away with insights you can use immediately.

Lunch
12:00-1:00 PM

Deputy Treasurers/Chiefs of Staff Caucus Meeting (Invitation only)
2:00-3:00 PM
Mistletoe

Treasurers' Discussion (Invitation Only)
3:00-4:00 PM
Paeso
Join your fellow State Treasurers for a members-only meeting and pre-conference meet and greet.

TMTS New Attendee Orientation
5:00-5:45 PM
Oklahoma Station Ballroom 2-3
New to NAST? First time attendee? Join us for an overview of the conference schedule, explore the conference app, meet the staff and NAST leadership. Hear from NAST experts about the various tracks and what you can expect during evening events as we welcome you into the NAST family. You'll also hear from Corporate Affiliate Board members about membership, ask questions, and reconnect with friends and colleagues. All questions,comments and feedback are welcome.

Welcome Reception
6:00-8:00 PM
Oklahoma Station Ballroom Prefunction & Scissortail Terrace
Step back into the glitz and glamour of the 1970s as we celebrate NAST's 50th Anniversary at the Treasury Management Training Symposium Opening Reception! Inspired by the iconic energy of Studio 54 and the disco era, this unforgettable evening will feature retro vibes, dazzling décor, and plenty of opportunities to connect with colleagues in style. Attendees are encouraged to embrace the theme and dress in their favorite 70s-inspired attire — from disco

chic to funky flair. Don't miss the themed photo opportunities that will let you capture the fun and commemorate this milestone celebration. Get ready to dance, network, and celebrate five decades of excellence with a night of nostalgia and sparkle! All registered attendees are invited.

Young Professionals (45 & Under) Reception, Hosted by the NAST Corporate Affiliate Board
8:00-10:00 PM
The Vault at The National Hotel, 120 N Robinson Ave, Lower Level
All conference attendees 45 and under are invited to join NAST Corporate Affiliate Board members for this reception. Meet & network with colleagues from both public and private sectors!

Tuesday, June 16
Networking Breakfast & Welcome from NAST Leadership & Host State Treasurer
7:30-8:20 AM
Join us for breakfast and hear from NAST Secretary-Treasurer Treasurer Erick Russell (CT) & Oklahoma Host State Treasurer Todd Russ.

Networking Lunch & Keynote Speaker
Networking Lunch 12:00-1:00 PM
Keynote Speaker 1:00-2:00 PM
*Mike Cessario, the mastermind behind the brand that turned canned water, **Liquid Death**, into a cultural phenomenon will be joining TMTS as the featured keynote speaker. Not familiar? Check out this **CNBC Make it video** to learn more about Mike and Liquid Death.*

With bold ideas, fearless branding, and a knack for breaking every rule in the book, Mike will bring fresh energy and real-world insights on innovation, disruption, and standing out in a crowded market. If you're ready to think bigger, market smarter, and have a little fun while doing it, this is a keynote you won't want to miss. Come thirsty for inspiration!

Sponsor Showcase
4:30-5:30 PM
Looking for ideas you can actually use? Join us for five-minute Sponsor Showcases that highlight practical solutions and partnerships helping State Treasurers and agencies deliver results.

Dinner & Exhibits at the First Americans Museum
6:30-9:00 PM
Get excited for the opportunity to explore all the interactive exhibits and enjoy a buffet dinner with all conference attendees. Transportation will be provided to the museum.

Wednesday, June 17
Networking Breakfast
7:30-8:20 AM

Back by popular demand networking by topic. Which issues do you want to talk about? Find the corresponding colored table cloth for peer-to-peer discussions. See the app and signs to find your topics and color!

Networking Lunch
12:00-1:30 PM
Continue your peer-to-peer conversations! Find the corresponding colored table cloth in the app to find your topics and color.

Dinner & Entertainment at Jones Assembly
6:30-9:00 PM
Join us for a casual evening of fun conversation & entertainment with your colleagues and friends. Jones is a 15 minute walk from the hotel. A shuttle service from the hotel to the venue will also be available as needed.

Thursday, June 18
Networking Breakfast
7:30-8:15 AM

Boxed Lunch
12:00-1:00 PM

ABLE Savings Plans
Oklahoma Station Ballroom 2-3

Monday, June 15

ABLE Boot Camp
1:00-3:00 PM
Get your ABLE self in shape with this first-ever ABLE Boot Camp! Seasoned ABLE veterans and new-bees alike will flex their ABLE muscles – from history of ABLE legislation and regulations to ABLE Basics, the role of SSA and promoting ASPN.

ASPN All Member Meeting
3:00-4:00 PM

Tuesday, June 16

The Impact of ABLE Age Adjustment: What We've Learned and How We Should Adapt
8:30-9:30 AM
Five months have passed since the long-awaited ABLE Age Adjustment Act went into effect. What have we learned, and how can we implement these new findings? This session will cover:

- *ABLE Age data analysis, comparing the new cohort of savers (whose disabilities began after age 26) to the prior eligible population. What differences do we see in demographics? Investment choices? Veteran status? Saving and spending behaviors?*
- *What does this data mean for Plans?*
    - *Does it suggest new investment needs, like target date funds?*
    - *Are there new ways we should be talking about ABLE plans in the public? In particular, how do we market to the large number of ABLE-eligible individuals who are not receiving disability benefits? Or to eligible people who do not think of themselves as having a "disability" or "disability expenses"?*

Come discuss how we can work collectively to show our changing demographic the power of ABLE.

Simple Messaging, Meaningful Connections: Expanding ABLE Outreach
9:45-10:45 AM
This session explores strategies for strengthening ABLE outreach through clear messaging and community engagement. Presenters will share approaches for connecting with veterans and other individuals with disabilities or medical concerns, simplifying ABLE information, and building partnerships that increase awareness and participation. The session will focus on moving beyond traditional outreach, adapting messages for new channels and formats, and making ABLE's impact easy to understand, easy to share, and easy to champion. Attendees will leave with uplifting and practical strategies to strengthen outreach efforts, expand advocacy partnerships, and position ABLE as the go-to financial solution for eligible individuals.

Staying in Control: Fraud, Compliance, and AI Security Awareness
11:00-12:00 PM
What are ABLE programs doing to protect their account owners and secure their ABLE assets? Join leaders in information security and fraud focusing on financial services and specifically ABLE accounts. We will discuss the latest types of financial fraud, tools to combat fraud, and how to stay ahead or at least keep up with perpetrators of fraudulent attacks. What may be discussed includes, but not limited to: (Phishing, Artificial Intelligence Scams, Deepfakes, Social Engineering, & Ransomware). This session will be critical to support operational enhancements,

outreach objectives with clear messaging, and ensure our accountholders are protected in an ever changing world.

The ABLE advantage for building savings, credit, and investor confidence
2:15-3:15 PM
This session highlights how ABLE programs stand out among financial options and how they empower accountholders to build stronger financial futures. Participants will explore the unique benefits of ABLE accounts compared to traditional banking, trusts, HSAs, and SSA cards, and learn how financial education, especially credit building and investment guidance, can strengthen outcomes for eligible individuals. Panelists will highlight successful partnerships and share practical tools and strategies from the ABLE National Resource Center. These resources are designed to support people with disabilities, their families, and professionals, while reinforcing ABLE as a leading and trusted option for financial management.

State of the States
3:30-5:00 PM
Hear from your colleagues about new initiatives, proposed/enacted legislation supporting state ABLE programs; partnership opportunities; marketing attempts/successes, staffing expansions, etc. This opportunity is focused on joining together with your ABLE peers to learn of ideas to incorporate in your state.

Wednesday, June 17

Annual ABLE Data Review: Identifying Trends and Opportunities
8:30-9:30 AM
The ASPN data committee will utilize member reported data to prompt discussions and highlight industry successes in account growth, outreach, and saver behavior that signals new opportunities. For 2026, the ASPN data committee expects early data related to age expansion to be available.

Words Matter - How to Communicate with ABLE Investors but Skip the Legalese
9:45-10:45 AM
In today's market, plan administrators have made meaningful progress in communicating with potential ABLE investors in a clearer and more accessible way. However, the industry still faces significant challenges in presenting essential information in a manner that is truly easy for investors to understand—particularly given that many ABLE investors tend to have less investment experience than the broader investing population. This session will explore practical strategies for simplifying and strengthening disclosures while staying fully compliant with federal requirements. It will also offer straightforward, actionable takeaways to help us communicate more effectively and confidently with ABLE investors.

Strategies for Negotiating and Securing ABLE Program Sponsorships
11:00-12:00 PM
Partnerships and sponsorships are critical to supporting the growth and sustainability of ABLE programs. This session will focus on strategies for successfully negotiating partnerships with key stakeholders, including financial institutions, corporate partners, and non-profit organizations. Hear from ABLE/529 plan professionals as they share success stories, practical negotiation strategies, and tips for working with stakeholders to create effective partnerships.

Special Needs Trusts and Pooled Trusts and Medicaid Recovery: What to know and how they interact with ABLE accounts
1:45-2:45 PM
This session will discuss the difference between Special Needs Trusts, Pooled Trusts as well as Miller Trusts. We will explore how they can be used, when they can be helpful, and how these tools interact with ABLE accounts. Medicaid recovery will also be discussed and how it can differ among these options.

Progress Unlocked: What the Last Year Taught Us About Expanding ABLE Through Entities
3:00-4:00 PM
The work of an organization that supports individuals living with a disability is both profoundly important and deeply rewarding, calling employees to serve as compassionate, trusted resources every day. And integrating ABLE savings into that mission should feel just as rewarding – without having to shoulder a large administrative burden. Many states have introduced simplified, streamlined ABLE entity account management, making it far easier and more appealing for organizations to oversee multiple ABLE accounts. In this session, these states will share how they successfully promoted and implemented these enhancements—and the impact they're already seeing.

Thursday, June 18

Leveraging the media buzz of Trump Accounts to drive 529 & Auto-IRA saving
8:30-9:15 AM
There is a lot of media buzz around Trump Accounts (many like to call them 530A Accounts). Many in our industry see this as a distraction. But we should see this as an opportunity to ride the media coat tails to drive savings in our plans or programs. This session will discuss the ways our industry and individual plans/programs can best capitalize on the buzz around these accounts.

Launch Event for the National Consortium on College Savings Research
9:45-10:30 AM
Join the formal launch of the National Consortium on College Savings Research, created to study and strengthen 529 plans and help families meet savings goals. Hosted by the University of Chicago and Stanford University, with support from NEFE and NAST, the Consortium brings together researchers, state administrators, and asset managers. This session will outline its model, share inaugural research priorities, and highlight opportunities for others to engage and contribute.

When Leadership Changes: Building Resilient Treasury Teams Through Transition
9:45-12:00 PM
Leadership transitions in a treasury office—whether planned or unexpected—can test operational stability and team confidence. This session explores practical strategies for maintaining continuity during leadership changes, including succession planning, knowledge transfer, and effective communication. Participants will discuss approaches to preparing for anticipated transitions while also responding quickly and effectively when unexpected changes occur. Attendees will leave with actionable ideas to help their treasury offices remain stable,

transparent, and resilient through periods of leadership change.

Banking & Cash Management
Mistletoe

Thank you Fidelity for your track sponsorship!

Tuesday, June 16

The Economic State of States: Adapting to the Evolving Landscape
Joint Session with State Debt Issuance
8:30-9:30 AM
As we enter the second year of the current presidential administration, the economic backdrop continues to shift, with tailwinds shifting to crosswinds—solid economic output with muted employment trend. The landscape continues to be marked by benchmark interest rate uncertainty and persistent inflationary above stated policy levels, which suggest that states may be entering a new phase of growth in both the short and long term. This panel will delve into the latest macroeconomic trends and the geographical disparities among states.

Rethinking Cash Management in a Changing Market: Liquidity meets opportunity
9:45-10:45 AM
As short term rates shift, now may be an opportune time to reassess what cash can—and can't—deliver going forward. As cash yields are drifting lower, we will discuss the evolving short-term rate outlook and where investors can look for attractive yields without sacrificing liquidity. Taking a more strategic and customized approach to cash, such as tiering balances by liquidity needs and expanding into high quality short duration securities, may help lock in higher income and potentially stronger returns.

Deception by Design: How AI is Revolutionizing Financial Crime and What Treasurers and their staff Must Do
11:00 AM-12:00 PM
Fraudsters are increasingly leveraging artificial intelligence to advance financial crimes such as Business Email Compromise, social engineering, account takeover, and cybercrime—including a rapid rise in ransomware attacks. This presentation covers the current threat landscape, focusing on how AI enables more sophisticated and convincing attacks, making it easier for criminals to deceive individuals and organizations. Account takeover is highlighted as one of the fastest-growing crimes worldwide, driven largely by poor password security and successful social engineering tactics, both exacerbated by AI-driven tools. The session will also address mitigation strategies, best practices to prevent fraud and cybersecurity attacks, and methods to enhance business resiliency in the face of these evolving threats.

Tokenized MMF's: The Future of Collateral and Cash Liquidity
2:15-3:15 PM
As Treasury teams navigate a turbulent interest rate environment, evolving regulatory demands and complex collateral requirements, digital innovation is reshaping institutional cash management. In this session, BNY will introduce its tokenized MMF solution-developed through a collaborative initiative with leading market participants. Acting as the tokenization manager on a secure distributed-ledger platform, BNY manages the minting and burning of digital fund tokens to mirror underlying fund shares. This fully integrated solution empowers treasury teams to subscribe, redeem and custody tokenized MMF shares from multiple fund partners via a single digital platform, LiquidityDirect. With the future goal of enhancing transferability and expanding eligible collateral uses, whether for margin requirements, secured financing, or

instant liquidity, tokenized MMFs have the potential to help mitigate funding risk and reduce reliance on traditional redemption cycles. Attendees will gain an understanding of the operational architecture underpinning tokenized MMFs, insights into practical use cases and integration strategies for treasury systems, and a forward-looking perspective on regulatory, technological and market developments shaping digital liquidity.

Protecting Local Funds Through Strategic Investing Amidst Changing Regulations
3:30-4:30 PM
The speakers will discuss the fundamentals of managing a Local Government Investment Pool considering cash flows, federal regulations, state code, GASB, and ratings criteria. 1. Develop the appropriate framework for managing a LGIP to protect taxpayer funds and provide liquidity while protecting principal. 2. Examine GASB pronouncements, SEC regulations, relative state statutes, and upcoming changes to certain investment products to ensure the LGIP is compliant. 3. Develop reports for internal and external shareholders demonstrating adherence to both state code and basic tenets of public fund investing

Wednesday, June 17

Stablecoins for State Treasuries: Securing Innovation with Treasury Operations
Joint Session with Innovations & Technology in the Treasury
8:30-9:30 AM
Stablecoins are projected to become "digital cash" in the real economy, and states are beginning to explore what that could mean for treasury operations. After a "Stablecoins 101" overview, this session examines the risks and rewards of state-issued tokens through case studies like state-specific stablecoins, Security-Backed Yield-Bearing (SBYB) models, and GENIUS compliant stablecoin models. The conversation will address how blockchain-based payment rails can enhance transparency and auditability in government disbursements while weighing the risks these instruments introduce. We'll discuss how these innovations combat fraud in government payments and the federal backdrop under the GENIUS Act. We'll also offer real-world private sector use cases that utilized modern technology capabilities to simplify stablecoin adoption.

The Last Mile: Strategies to reduce or eliminate check disbursements
9:45-10:45 AM
An in depth review of strategies and considerations to reduce or eliminate check disbursements. Defining stakeholders, identifying innovation and technology, and outlining best practices to achieve the goal.

Cash Forecasting and Investing Fundamentals
11:00 AM-12:00 PM
Cash forecasting is one of the most foundational disciplines in treasury, yet many public-sector organizations still rely on fragmented inputs, inconsistent processes, or forecasting approaches that are difficult to maintain over time. This session will provide a practical, educational walkthrough of the mechanics of cash forecasting, with a focus on best practices that improve forecast accuracy, strengthen organizational planning, and enable better financial decision-making. Learning objectives: 1. Attendees will develop the skills to build and sustain a cash forecasting process. 2. Attendees will learn how to implement the mechanics of cash forecasting to support more effective communication with internal stakeholders and governing bodies. 3. Attendees will understand how to construct an investment portfolio that provides for

liquidity and meaningful income.

A Tale of Three States

1:45-2:45 PM

This session will focus on the legality of investments from state to state, crafting a sound investment policy based off of state code and utilizing allowable investments to create a portfolio that adheres to safety, liquidity and yield in all interest rate environments. Learning objectives: 1. Attendees will examine state code and provide examples of how to construct a sound investment policy that protects taxpayer funds. 2. Attendees will be able to manage investments in various rate scenarios to adhere to the principles of safety, liquidity and yield. 3. Attendees will be able to contrast the risk versus reward of various investment types.

529 Education Savings Plans
Oklahoma Station Ballroom 4

Thank you Catalis & Orion for your track sponsorship!

Monday, June 15

CSPN Prepaid Tuition Plan Forum
1:00-3:00 PM

Fundamentals Primer
3:00-4:00 PM

CSPN All Member Meeting
4:00-5:00 PM

Tuesday, June 16

The Good, The Bad, and The Ugly Making Sense of the Ever-Changing College Savings Landscape: A Panel on Policy, Practice, and Alignment
8:30-9:15 AM
State treasurers, federal partners, and national organizations are navigating a complex college savings landscape shaped by overlapping programs and evolving policy. This session explores how states are responding, with a focus on the intersection of 529 plans, Child Savings Accounts (CSAs), and emerging federal frameworks. Grounded in SEED for Oklahoma Kids, panelists will share practical insights on aligning policy with implementation, improving coordination and communication, and supporting families as programs evolve.

Marketing Analytics - How to use them to your advantage
9:45-10:30 AM
This session will explore how plan administrators can use marketing analytics to drive growth, accountability, and efficiency within budget limitations. Panelists will share best practices for selecting benchmarks, prioritizing high-impact metrics, and holding teams accountable across strategies. The discussion will examine available analytics, match key metrics to tactics, and show how aligning analytics with outcomes ensures every marketing dollar delivers results.

An Opening for Nontraditional Career Pathways: 529 Plans for Tomorrow's Workforce
11:00-11:45 AM
With 90% of companies investing in skills-based hiring, families are exploring how new 529 legislation can fund diverse education pathways. Once limited to college savings, 529 plans now support certifications and non-degree programs that offer strong career outcomes at lower cost and in less time. This session examines evolving 529 policies, focusing on tech and digital skills, and how expanded uses can improve access, affordability, and upward mobility for a broader range of learners.

The Employer Channel: Is It Worth It?
2:15-3:00 PM
The 529 industry has invested heavily in the employer channel, yet results can fall short. This session examines whether the channel's purpose is awareness, conversions, or both, and

highlights best practices, streamlined processes, and meaningful metrics. We'll explore ways to simplify employer engagement, improve employee participation, and strengthen tracking. The discussion will also cover potential state and federal legislation—such as employer tax incentives for matching contributions—that could significantly enhance the employer channel's effectiveness.

The Next Chapter of 529 Plans: Trust, Technology, and Stewardship
3:30-4:15 PM
As 529 plans grow in scale, complexity, and impact, their success increasingly depends on trust, data stewardship, and thoughtful use of technology. This session explores how plans are navigating digital transformation including the responsible use of analytics and emerging AI capabilities alongside evolving account ownership structures and rising expectations from families. Attendees will gain insights into governance, data integrity, and participant experience strategies that support growth while maintaining public confidence in 529 education savings programs.

Wednesday, June 17

How Financial Literacy Impacts College Savings Outcomes
Joint Session with Financial Education & Empowerment
8:30-9:15 AM
The college savings industry often overlooks financial literacy, despite evidence it strongly influences 529 participation and outcomes. Research from the TIAA Institute–GFLEC and the University of Chicago shows literacy levels are generally low and predictive of both account ownership and savings success. This session brings together researchers, NEFE, and Illinois practitioners to examine this connection, share best practices in financial education, and engage participants in discussions on helping families improve college savings outcomes.

Gut Check on 529 Investment Lineup
9:45-10:30 AM
This panel offers a strategic "gut check" on today's 529 investment lineups, shaped by regulatory expansion of eligible expenses and evolving participant needs. We'll examine how the industry is adapting to continue to serve traditional college savers with core, multi-asset options while balancing investment offerings catered to more flexible goals. We'll also explore how plan fiduciaries assess market dynamics, investor behavior, and suitability of complex investment vehicles as they pursue innovation to maximize participant outcomes.

Honoring Identity Early: Leadership Lessons for Expanding Educational Opportunity
Joint Session with Financial Education & Empowerment
11:00-11:45 AM
Expanding participation in education savings programs requires trust, cultural relevance, and early engagement—not just awareness. This session explores the front-end conditions shaping whether families view postsecondary education and long-term planning as attainable. Centering diversity and leadership, the panel offers actionable strategies to build trust with Indigenous and historically underserved communities, strengthen inclusive outreach, and increase participation through early childhood engagement, effective leadership practices, and state–community partnerships that address systemic barriers.

State of the States
1:45-4:00 PM
"State of the States" brings together leaders from across the country to share the latest

developments in college savings programs. Representatives will highlight innovative marketing strategies, program enhancements, and key lessons learned. This session offers a valuable opportunity for peer exchange, helping states learn from one another, identify emerging trends, and strengthen their efforts to better serve families and expand participation.

529 Plan Executive Directors Roundtable (Invitation Only)
4:00-5:00 PM

Thursday, June 18
Leveraging the media buzz of Trump Accounts to drive 529 & Auto-IRA saving
8:30-9:15 AM
There is a lot of buzz around Trump accounts, yet there are still so many unknowns. Are the accounts a distraction or an opportunity to drive savings in our plans? In this interactive session, we will create a SWOT Analysis on the Trump Account's impacts on 529 plans and discuss ways to best capitalize on the buzz.

Launch Event for the National Consortium on College Savings Research
9:45-10:30 AM
Join the formal launch of the National Consortium on College Savings Research, created to study and strengthen 529 plans and help families meet savings goals. Hosted by the University of Chicago and Stanford University, with support from NEFE and NAST, the Consortium brings together researchers, state administrators, and asset managers. This session will outline its model, share inaugural research priorities, and highlight opportunities for others to engage and contribute.

Financial Education & Empowerment
Pinon

Thank you Enrich for your track sponsorship!

Tuesday, June 16

Beyond the Tipping Point - What's Next for Youth Financial Education?
8:30-9:30 AM
With California's recent passage of a financial education mandate for students, we have reached a tipping point where more than 2/3 of students will receive at least some form of mandated financial education by 2030. This session will explore what we can collectively do to ensure that young people are not only receiving the information they need but that we deliver effective, timely and relevant financial education as well. Drawing on new research and the experience of a diverse panel, we will help chart a course for treasurers, their teams, and a variety of stakeholders.

Building Trust in Government by Building Generational Wealth
Joint Session with Innovations & Technology in the Treasury
9:45-10:45 AM
Leaders across the political spectrum agree that expanding economic opportunities can build trust in financial and government systems and create better financial futures for young people. This session will explore policies like Baby Bonds that can provide families with meaningful resources to better facilitate financial education and upward economic mobility.
Key topics include: Equitable wealth building opportunities for State Treasurers and philanthropy. Bold policies, like Baby Bonds that can deliver on the promise of a fair start and economic mobility. Compare and contrast with other wealth building vehicles (e.g. Trump accounts).

How State Treasurers Can Support K-12 Financial Education Requirements
11:00-12:00 PM
30 states have now enacted legislation or regulatory changes requiring students to complete a semester-length personal finance course in order to graduate from high school. 17 of those states are still actively preparing for those requirements to become effective, and the rest are facing ongoing challenges around teacher professional development and program evaluation. State Treasurers are often the leading voice for financial education in their state, with dedicated resources, deep expertise and extensive connections with critical stakeholders to support the work. At this session the National Endowment for Financial Education (NEFE) Policy and Advocacy team will highlight the ways in which State Treasurers and their staff can inform, influence and support the development and implementation of K-12 personal finance requirements in their state. NEFE will be joined by a panel of Treasurer staff members who have supported or are actively supporting this work on the ground in their own states to provide real-world insights and actionable recommendations for attendees. A group discussion between the panel and attendees will offer an opportunity to explore strategies more deeply and foster opportunities for connection.

Moving from Metrics to Momentum: Tennessee's Financial Wellness Scorecard Summits
2:15-3:15 PM
Tennessee's Financial Wellness Scorecard Summits demonstrate how trusted data can move

leaders from awareness to action. This session presents a replicable, scorecard-driven convening model that aligns grasstops stakeholders around shared metrics, structured dialogue, and locally informed solutions. Participants will learn how to use financial wellness data to convene cross-sector partners, identify priority gaps, and translate insight into coordinated, community-level action.

Modern Financial Education in a Rapidly Changing Economy
3:30-4:30 PM
As states expand financial education requirements, Treasurers are seeking practical ways to deliver them at scale. This session explores what actually works to bridge that gap—highlighting public-private partnerships that embed financial education earlier, equip teachers without increasing state staffing, and leverage AI-powered delivery models. Case studies will include accredited budgeting workshops and financial coaching approaches that build lifelong money management skills and empower individuals to take control of their financial journeys. Attendees will learn how states can deploy scalable, community-based solutions quickly and effectively.

Wednesday, June 17

How Financial Literacy Impacts College Savings Outcomes
Joint Session with 529 College Savings Plans
8:30-9:15 AM
The college savings industry often overlooks financial literacy, despite evidence it strongly influences 529 participation and outcomes. Research from the TIAA Institute–GFLEC and the University of Chicago shows literacy levels are generally low and predictive of both account ownership and savings success. This session brings together researchers, NEFE, and Illinois practitioners to examine this connection, share best practices in financial education, and engage participants in discussions on helping families improve college savings outcomes.

Turning Financial Education Into Lasting Wealth
9:45-10:45 AM
Financial education alone rarely changes long-term outcomes. This session explores how pairing real asset ownership with learning transforms student behavior, confidence, and financial trajectories. Attendees will explore Gifted Savings, a proven nonprofit offering a public-private model that pairs experiential financial education with real investment accounts. University of Georgia research will highlight short- and long-term impact. Attendees will leave with implementation insights, policy considerations, and strategies to bring asset-based financial education to their state.

Honoring Identity Early: Leadership Lessons for Expanding Educational Opportunity
Joint Session with 529 College Savings Plans
11:00-11:45 AM
Expanding participation in education savings programs requires more than awareness campaigns—it requires trust, cultural relevance, and early engagement. This session addresses the front-end conditions that influence whether families see postsecondary education and long-term planning as accessible and attainable. By centering diversity and leadership, this panel offers actionable insight into how inclusive practices can strengthen outreach, engagement, and participation over time.

The Opportunity for State-level Financial Empowerment Leadership
1:45-2:45 PM

Through leveraging their leadership, policy, funding, and programs, state governments are well-positioned to advance resident financial security at scale. This session will highlight how the establishment of a dedicated state Office of Financial Empowerment (OFE) builds government infrastructure to coordinate financial stability efforts, infuse a financial empowerment lens across agencies, and raise the profile and impact of this work, using illustrative examples of state-level strategies. Attendees will gain a foundational understanding of what an OFE is and the unique opportunity it offers.

Informal Financial Education Directors' Caucus Meeting
3:00-4:00 PM
Join caucus members for a chance to connect in person!

Other Sessions of Interest on Thursday, June 18
Leveraging the media buzz of Trump Accounts to drive 529 & Auto-IRA saving
8:30-9:15 AM
Oklahoma Station Ballroom 4
There is a lot of media buzz around Trump Accounts (many like to call them 530A Accounts). Many in our industry see this as a distraction. But we should see this as an opportunity to ride the media coat tails to drive savings in our plans or programs. This session will discuss the ways our industry and individual plans/programs can best capitalize on the buzz around these accounts.

Launch Event for the National Consortium on College Savings Research
9:45-10:30 AM
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When Leadership Changes: Building Resilient Treasury Teams Through Transition
9:45-12:00 PM
Route 66
Leadership transitions in a treasury office—whether planned or unexpected—can test operational stability and team confidence. This session explores practical strategies for maintaining continuity during leadership changes, including succession planning, knowledge transfer, and effective communication. Participants will discuss approaches to preparing for anticipated transitions while also responding quickly and effectively when unexpected changes occur. Attendees will leave with actionable ideas to help their treasury offices remain stable, transparent, and resilient through periods of leadership change.

Tuesday, June 16

Crypto and Unclaimed Property: Beyond the Basics
Joint Session with Unclaimed Property
8:30-9:30 AM
We always talk about crypto, but what about NFTs? Is the market DOA (dead on arrival)? Join us as we talk about the implications of tokenization of assets and their implications for reporting, including concerns about the Federal CLARITY Act, Stablecoins—what they are and predictions for UP reporting and "Staking" unclaimed bitcoin.

Building Trust in Government by Building Generational Wealth
Joint Session with Financial Education & Empowerment
9:45-10:45 AM
Leaders across the political spectrum agree that expanding economic opportunities can build trust in financial and government systems and create better financial futures for young people. This session will explore policies like Baby Bonds that can provide families with meaningful resources to better facilitate financial education and upward economic mobility.
Key topics include: Equitable wealth building opportunities for State Treasurers and philanthropy. Bold policies, like Baby Bonds that can deliver on the promise of a fair start and economic mobility. Compare and contrast with other wealth building vehicles (e.g. Trump accounts).

Plotting Your Course: Michigan, Pennsylvania, and North Carolina Strategic Plans
11:00-12:00 PM
This panel will explore how the Treasury departments in Michigan, Pennsylvania, and North Carolina developed comprehensive strategic plans to guide their long-term priorities. Panelists will share insights into the planning process, highlight strategies for setting realistic and measurable goals, and discuss mechanisms for ensuring ongoing accountability within each Treasury.

AI Unleashed: Revolutionizing Government Treasury in Turbulent Times
2:15-3:15 PM
The landscape is rapidly evolving, and AI is at the forefront of this transformation, compelling government agencies to adapt and embrace new technologies. Join us as we explore how AI is reshaping the current landscape, particularly in areas like core cash payments, checks, ACH, and cash posting. In the face of challenges such as natural disasters, cyber threats, and staffing shortages, AI offers innovative solutions that will revolutionize our operations over the next several years. We'll examine how our agencies will transform over the next several years while needing to do more with fewer resources available at disposal.

Unmasking the Digital Shadows: Navigating Today's Cyber Landscape
3:30-4:30 PM
Cyber threats facing state and local treasury organizations are accelerating in scale, sophistication, and impact. In this session, we examine today's cyber threat landscape through real-world case studies, highlighting ransomware, phishing, business email compromise, and

emerging AI-driven fraud. Attendees will gain practical insight into how modern attacks unfold, why treasury functions are prime targets, and actionable steps leaders can take to strengthen cyber resilience and protect critical financial operations.

Wednesday, June 17

Stablecoins for State Treasuries: Securing Innovation with Treasury Operations
Joint Session with Banking & Cash Management
8:30-9:30 AM
Stablecoins are projected to become "digital cash" in the real economy, and states are beginning to explore what that could mean for treasury operations. After a "Stablecoins 101" overview, this session examines the risks and rewards of state-issued tokens through case studies like state-specific stablecoins, Security-Backed Yield-Bearing (SBYB) models, and GENIUS compliant stablecoin models. The conversation will address how blockchain-based payment rails can enhance transparency and auditability in government disbursements while weighing the risks these instruments introduce. We'll discuss how these innovations combat fraud in government payments and the federal backdrop under the GENIUS Act. We'll also offer real-world private sector use cases that utilized modern technology capabilities to simplify stablecoin adoption.

Emerging AI and Quantum Technologies: Strategic Risk-Balancing for the Tech-Forward Treasury
9:45-10:45 AM
AI and Quantum technologies are reshaping both opportunity and risk for Treasury Operations. This session explores how AI can drive efficiency while introducing new cyber threats, and how Quantum computing may disrupt future security. Our panel will outline practical steps to leverage emerging technology today while strengthening resilience for tomorrow - without compromising your cyber resilience.

Governing the Gigawatts: Data Centers and Public Policy
11:00-12:00 PM
Data centers bring meaningful advantages and real drawbacks. They strengthen digital infrastructure, attract major investment, support AI research, and generate little traffic. Yet they can strain resources, offer few permanent jobs, raise utility costs, and potentially lead to more regulatory oversight of a municipal utility. For treasury management offices, understanding the dynamics of long-term utility revenue stability, capital-planning needs, and regulatory exposure is essential. This session will review best practices for policymakers to balance the competing impacts of data centers.

Thursday, June 18

When Leadership Changes: Building Resilient Treasury Teams Through Transition
9:45-12:00 PM
Leadership transitions in a treasury office—whether planned or unexpected—can test operational stability and team confidence. This session explores practical strategies for maintaining continuity during leadership changes, including succession planning, knowledge transfer, and effective communication. Participants will discuss approaches to preparing for anticipated transitions while also responding quickly and effectively when unexpected changes

occur. Attendees will leave with actionable ideas to help their treasury offices remain stable, transparent, and resilient through periods of leadership change.

Retirement Security
Automobile Alley C

Tuesday, June 16

Mother of Invention: New Ideas for State Savings Programs in a Time of Restricted Budgets

9:45-10:45 AM

Faced with increasingly strained budgets, state programs must be more innovative than ever to achieve their goals. Cross-state collaborations, saver incentive programs, and private sector partnerships are just some of the creative ways state-sponsored savings programs have implemented solutions to improve participation and saver outcomes. Come see what new tools and resources are available to turn universal budget gloom into successes for your programs.

Preparing for the Future: Saver Engagement Strategies to Improve Outcomes

11:00 AM-12:00 PM

With limited resources, state savings programs must choose the right returns on investment for engaging savers. How much communication is too much communication, or not enough? How does that communication translate into long term retirement? What strategies are needed to activate the target demographics for the program, and help with the right behavior "nudges" while keeping options flexible for individual circumstances?

"I'm Just a Bill": Responding to Legislative Challenges and Changes in Retirement Security

2:15-3:15 PM

From SECURE 2.0 to the OBBB and Trump accounts, legislation affecting state sponsored savings programs are a complex landscape of policy and law with potentially widespread impacts on the retirement landscape. How will Trump Accounts affect retirement programs in the future? What are the solutions to the Saver's Match implementation at the federal and state level? Is universal retirement access on the horizon, and how will it affect state retirement programs and their private sector partners? Join this panel for a robust discussion on what to expect in retirement security now and in the future, and how states and their partners can respond to an evolving financial health space.

Home Health Care Workers: Taking Care of Those Who Take Care of Us

3:30-4:30 PM

Home health aides represent a significant percentage of people in America who lack access to retirement savings. While State Programs often include specific provisions to cover these deserving workers, federal tax laws and even some competing state initiatives may limit or even preclude their participation in our Programs. This session will explore the federal laws that impact participation and explore opportunities to ensure that no one is precluded unintentionally.

Wednesday, June 17

Talking to Who's Not Here: Key Players to Engage for Maximum Impact

9:45-10:45 AM

Identifying your stakeholders is a key to success in outreach, and sometimes it can come from surprising places. From employers and employees to philanthropists and industry networks, having the right people involved makes all the difference. Join this panel of experts in savings program outreach to learn more about how engaging the right people can make a major impact on savings success.

Retirement Security State of the States
11:00 AM-12:00 PM
This open house panel will showcase current updates from program directors of retirement security programs across the country, administrators and industry stakeholders that support state-sponsored retirement programs, and include information on new initiatives, successes, challenges, initiatives, and other updates from the industry, etc. Come join retirement security to ask your questions on state retirement security programs with peers to learn more and share ideas together.

State Debt Issuance
Automobile Alley A-B

Thank you PFM for your track sponsorship!

Tuesday, June 16

The Economic State of States: Adapting to the Evolving Landscape
Joint Session with Banking & Cash Management
8:30-9:30 AM
As we enter the second year of the current presidential administration, the economic backdrop continues to shift, with tailwinds shifting to crosswinds—solid economic output with muted employment trend. The landscape continues to be marked by benchmark interest rate uncertainty and persistent inflationary above stated policy levels, which suggest that states may be entering a new phase of growth in both the short and long term. This panel will delve into the latest macroeconomic trends and the geographical disparities among states. (Joint w/ Banking)

Measuring Debt Affordability
9:45-10:45 AM
This session will present and discuss debt affordability metrics both at the state and local levels. Attendees will learn how different states approach this topic and why it is a vital tool to be used alongside debt issuance strategies.

Audit Readiness, Timeliness, and Addressing Bond Investor Expectations
11:00-12:00 PM
This session will highlight the challenges related to audit readiness amid technology challenges, leadership turnover, and other headwinds. Many entities have completed ERP systems, but others are still assembling the details. This session will address the evaluation of needs and planning that will promote continued support with respect to financial reporting. Help your state avoid the title of 'last one to file their annual audit'.

State Issuer Investor Relations Roundtable
2:15-3:15 PM
Effective investor relations programs are increasingly important for state issuers navigating evolving disclosure expectations, market volatility, and a diverse investor base. This roundtable session will bring together state debt management professionals and investors to discuss how states approach investor engagement, transparency, and communication with the municipal market. Participants will share practical strategies for maintaining strong relationships with investors, including best practices for investor calls, roadshows, website disclosures, and responding to market inquiries. Through an open, peer-driven discussion, attendees will have the opportunity to exchange ideas, compare approaches across states, and identify tools that help strengthen market confidence and support successful bond issuances.

SDMN Meet and Greet/Tim Schaefer Memorial Debt Manager of the Year
3:30-4:30 PM
Join us for the awarding of the State Debt Management Network's (SDMN) annual "Tim Schaefer Memorial Award for Debt Manager of the Year" followed by a networking happy hour for those in the debt management industry. Hosted by the Board of SDMN.

Wednesday, June 17

Regulatory Roundtable: Key Updates from the SEC and MSRB
8:30-9:30 AM
Maintaining an open dialogue with regulators is essential for issuers and all market participants. This session provides a unique opportunity to engage with representatives from the MSRB and SEC as they discuss their latest priorities, regulatory developments, and areas of market focus. Gain insights into evolving policies, compliance expectations, and the broader regulatory landscape shaping the municipal market.

AI and the Future of Municipal Disclosure: Managing Risk and Market Perception
9:45-10:45 AM
Artificial intelligence is transforming how municipal disclosures, ACFRs, and investor materials are prepared—and how they are analyzed by investors and data platforms. Today, AI systems increasingly parse EMMA filings, Official Statements, and financial reports, meaning disclosure language, structure, and consistency can directly influence automated credit assessments and bond pricing.

This session will examine how debt managers can responsibly use AI in reporting and investment workflows, while also adapting disclosures for an AI-driven marketplace. Panelists will highlight practical strategies to protect the issuer's narrative, strengthen transparency, and mitigate risks as AI becomes embedded in capital markets.

Complex Debt Structuring in Action: Multi-Tranche Issuances, Refundings, and Tender Strategies
11:00-12:00 PM
Not all state debt transactions are straightforward new-money financings. Increasingly, issuers are executing highly structured transactions that combine new-money bonds, advance or current refundings, tender offers, restructurings, and multiple lien or credit structures within a single financing program.

This session will take a deep dive into a complex, real-world state issuance that layered multiple tools into one coordinated transaction. Panelists will walk through the strategic objectives, legal considerations, cash-flow modeling, rating agency engagement, investor communication strategy, and execution timeline. The discussion will also address market timing, pricing dynamics, and risk management considerations when blending refundings, tenders, taxable and tax-exempt components, and other structural features.

This session will provide practical insight into how sophisticated structuring can optimize savings, manage liabilities, improve credit metrics, and enhance long-term capital planning outcomes.

Rating Agency Roundtable/Credit Outlook
1:45-2:45 PM
After a year of major changes at the federal level, states are looking ahead with many economic and fiscal policy questions, challenges and opportunities. How are states positioned and what does it mean for credit ratings? What are the key topics and risks that rating analysts are focused on? Hear senior rating agency analysts from the different agencies discuss and debate their views on the factors that will be most important to ratings in the coming year.

Financing Sustainable Infrastructure: Leveraging SRFs, Bond Banks, and Regional Strategies

3:00-4:00 PM

Water systems across the country, particularly small and rural utilities, face mounting fiscal and operational pressures, including aging infrastructure, rising capital costs, extreme weather risk, cybersecurity threats, and uncertainty surrounding federal funding. Many systems struggle to address maintenance backlogs while preparing for long-term investment needs.

This session will examine practical financing and governance solutions to strengthen long-term solvency. Panelists will explore how states are leveraging State Revolving Funds (SRFs), municipal bond banks, and pooled financing programs to stretch federal EPA resources, lower borrowing costs, and enhance credit strength. The discussion will also highlight asset management best practices, regional collaboration models, and resiliency planning strategies that can help utilities build fiscally sustainable water systems for the future.

Unclaimed Property
Oklahoma Station Ballroom 6-8

Thank you Discovery Audit Services & Kroll for your track sponsorship!

Monday, June 15

NAUPA First Time Attendee Breakfast
8:00-9:00 AM

NAUPA Committee Meetings:

Fraud (States Only)
9:00-10:00 AM

Auditors (States Only)
10:00-11:00 AM

Virtual Currency and Emerging Trends (States Only)
10:00-11:00 AM

Legal (States Only)
11:00 AM-11:50 PM

NAUPA Welcome, Awards and the State of the States
2:00-3:30 PM
Receive an update from members around the nation and celebrate our award winners as we kick off the unclaimed property track.

Tuesday, June 16

Crypto and Unclaimed Property: Beyond the Basics
Joint Session with Innovations & Technology in the Treasury
8:30-9:30 AM
Crypto and Unclaimed Property; Beyond the Basics We always talk about crypto, but what about NFTs? Is the market OA (dead on arrival)? Join us as we talk about the implications of tokenization of assets and their implications for reporting, including concerns about the Federal CLARITY Act, Stablecoins—what they are and predictions for UP reporting and "Staking" unclaimed bitcoin.

Dirty Assets, Clean Reports, Cleaner Returns: Navigating Reporting Expectations for Fraud-Related Property and Protecting Departments Against Fraud
9:45-10:45 AM
The challenge of identifying and reporting "illicit property" continues to evolve, raising difficult questions at the intersection of fraud prevention, legal compliance, and unclaimed property administration. As dormancy periods expire on assets impacted by the surge in fraudulent activity—particularly during the pandemic—holders are increasingly confronted with both fraud-tainted property and a growing volume of suspicious or fraudulent claims. This panel will review the guidance issued to date, examine how divergent state positions can lead to competing or contradictory reporting obligations, and explore the practical challenges that arise when fraud intersects with unclaimed property reporting. Additionally, states face fraud on the

claimant side daily. In an effort to pay back even more money to the rightful citizens, learn how some states are using legislation and fuzzy matching to prevent fraud and return funds to the rightful owner. With numerous fraud cases making news nationwide, this panel will also dive deep into some of these cases which have led to convictions.

AI in Unclaimed Property: Practical Uses Today and What's Next
11:00-11:30 AM
AI is the hot new thing. But how could it be harnessed by unclaimed property programs? A panel of state and industry experts discuss how they are currently using AI and where they think AI can become a force multiplier for unclaimed property reporting, auditing, claims, and administration.

Unclaimed Property Federal Issues
11:30 AM-12:00 PM
Unclaimed Property programs and administrators used to have nothing to discuss at the NAST Legislative Conference in Washington, DC. Now we have issues before all three branches of the federal government. Get the latest updates on unclaimed savings bonds and the U.S. Treasury, SURCH (State Unclaimed Retirement Clearinghouse) and the U.S. Department of Labor, and the bills we support and oppose on Capitol Hill.

Sports Betting: What the Last Three Years Have Taught Us
2:15-3:15 PM
Sports betting: what the last three years have taught us It's been 8 years since the pivotal Supreme Court case that forever changed the landscape of Sports Betting in America. How has the state's appetite for this multi-billion-dollar industry affected unclaimed property and how do we see it changing in the future?

When Buy and Hold Turns into Bought and Forgotten: Protecting The Consumer In A Changing Securities Environment
3:30-4:30 PM
Unclaimed property laws involving securities and other investment properties have been the subject of a number of actual and proposed legislative changes in recent years. This session will review the different standards currently applicable to these types of property, how they are working to protect investors, and how changes to these laws can either help or hurt the ability of state unclaimed property programs to effectively safeguard unclaimed property.

Wednesday, June 17

Drilling Down into Unclaimed Property Mineral Rights
8:30-9:00 AM
Drilling Down into Unclaimed Property Mineral Rights For some states these are everyday reporting and claims issues, but for other states royalties and mineral interests are rare. The one thing we know is, any State can have them. Hear from states and industry representatives with expertise and see how these uncommon property types translate into bigger concerns for Unclaimed Property.

Custodians, Kids, and Compliance: UGMA and UTMA Explained
9:00-9:30 AM
Accounts established under the Uniform Gifts to Minors Act (UGMA) or Uniform Transfers to Minors Act (UTMA) are widely used methods for transferring wealth to a minor. Because these

accounts are usually opened when the minor is very young, the minor, who is the legal owner of the property, is frequently unaware of the existence of the account and/or at which institution the account is held. While state laws mandate that custodians (usually a parent of the minor) to transfer the property to the beneficial owner when they reach the age of majority (typically 18 or 21, depending on the state), such transfers do not occur automatically by law. This panel will address common questions that arise in the UP context surrounding UGMA/UTMA accounts, including: 1. When does dormancy begin? Is the answer different depending on who is the custodian? 2. Is activity by the custodian after the age of majority is reached an indication of owner interest in the property?

Problematic Provisions and Haphazard Holes in Unclaimed Property Laws
9:45-10:45 AM
In the recent explosion of litigation over unclaimed property, states often find out that a change in their statute might have made it easier to prevail or even prevented the litigation in the first place. In this session a panel of attorneys provide advice about problematic provisions and missing language that can be crucial to protecting your state's unclaimed property system.

Policy Implications of Record Retention for Holders and States
11:00 AM-12:00 PM
For the record: what to keep, and for how long? States frequently have to discuss record retention requirements with holders during examinations. But how often do state administrators or attorneys stop and think about their own record retention policies? Should states truly try to maintain every report, every aborted claim, every successful claim from now until the end of the universe? Digital records with PII pose a security risk. Record formats and mediums change over time. How do state records retention laws interact with unclaimed property laws and systems? A panel of state and industry experts discuss the policy implications of record retention for holders and states.

I Wish I Had an Answer to That, Because I'm Tired of Answering That Question: Setting the Record Straight About Unclaimed Property
1:45-2:45 PM
A lot that gets written about unclaimed property contains statements that are incorrect, taken out of context and/or biased. This session will review actual statements from recent articles, court briefings, and judicial opinions to identify themes of inaccurate or misleading information about how unclaimed property works and why it is important to set the record straight.

Turning Data into Dollars: Leveraging Data Matching to Boost Unclaimed Property Returns
3:00-4:00 PM
What do we have? Data! What do we want to do with it? Use it to return money to its owner! UP Databases are a plethora of information. See how States are using that information leveraged to cross reference and data match against other sources and government data to increase return rates and enhance Unclaimed Property operational effectiveness.

Thursday, June 18

Unclaimed Property Fundamentals: A Holder's Essential Guide (Holder Training)

8:30-9:30 AM

This foundational session provides a comprehensive overview of unclaimed property (UCP) essentials. Perfect for those new to UCP or needing a refresher, this session covers:

- ***What is Unclaimed Property?*** *Defining different property types and dormancy periods.*
- ***Due Diligence:*** *Understanding your legal obligations to locate owners.*
- ***Filing and Reporting:*** *Step-by-step guidance on accurate and timely reporting.*
- ***Unclaimed.org Resources:*** *Leveraging free resources to streamline your compliance efforts.*
- ***Finding your Money****: Businesses can have property, learn how to effectively search.*

Leave this session with a solid understanding of your core responsibilities.

Advanced Unclaimed Property Strategies: Audits, Compliance, and Beyond (Holder Training)

9:45-10:45 AM

Take your UCP knowledge to the next level! This session delves into advanced topics critical for experienced holders:

- ***NAUPA III File Formatting:*** *Learn about the new file format coming soon.*
- ***Oil, Gas, and Mineral Rights:*** *Dig deep into the complexities of reporting mineral rights.*

Gain insights to optimize your UCP processes and mitigate potential penalties.

Ask the Experts: Your Unclaimed Property Questions Answered (Holder Training)

11:00 AM-12:00 PM

This interactive session is your opportunity to get personalized answers from leading state unclaimed property administrators. Bring your toughest questions, whether they relate to reporting, compliance, audits, or specific property types. Benefit from direct access to experts and connect with representatives from various states, both in-person and virtually. This is a unique chance to clarify any uncertainties and build valuable relationships.

Tuesday, June 16

Marketing Analytics - How to use them to your advantage
Oklahoma Station Ballroom 4
9:45-10:30 AM
This session will explore how plan administrators can leverage marketing analytics to drive growth, accountability, and efficiency amid constrained marketing budgets. Panelists will share best practices for selecting the right benchmarks, prioritizing the metrics that matter most, and holding teams accountable across marketing strategies. The discussion will highlight the range of analytics available, explain why certain metrics are better suited to specific tactics, and emphasize aligning analytics with outcomes to ensure every marketing dollar is used effectively.

ABLE Plans: State of the States
Oklahoma Station Ballroom 2-3
3:30-5:00 PM
Hear from your colleagues about new initiatives, proposed/enacted legislation supporting state ABLE programs; partnership opportunities; marketing attempts/successes, staffing expansions, etc. This opportunity is focused on joining together with your ABLE peers to learn of ideas to incorporate in your state.

Wednesday, June 17

Words Matter - How to Communicate with ABLE Investors but Skip the Legalize
Oklahoma Station Ballroom 2-3
9:45-10:45 AM
In today's market, plan administrators have made meaningful progress in communicating with potential ABLE investors in a clearer and more accessible way. However, the industry still faces significant challenges in presenting essential information in a manner that is truly easy for investors to understand—particularly given that many ABLE investors tend to have less investment experience than the broader investing population. This session will explore practical strategies for simplifying and strengthening disclosures while staying fully compliant with federal requirements. It will also offer straightforward, actionable takeaways to help us communicate more effectively and confidently with ABLE investors.

Retirement Security State of the States
Automobile Alley C
11:00 AM-12:00 PM
This open house panel will showcase current updates from program directors of retirement security programs across the country, administrators and industry stakeholders that support state-sponsored retirement programs, and include information on new initiatives, successes, challenges, initiatives, and other updates from the industry, etc. Come join retirement security to ask your questions on state retirement security programs with peers to learn more and share ideas together.

I Wish I Had an Answer to That, Because I'm Tired of Answering That Question: Setting the Record Straight About Unclaimed Property
1:45-2:45 PM
Oklahoma Station Ballroom 6-8

A lot that gets written about unclaimed property contains statements that are incorrect, taken out of context and/or biased. This session will review actual statements from recent articles, court briefings, and judicial opinions to identify themes of inaccurate or misleading information about how unclaimed property works and why it is important to set the record straight.

529 Plans: State of the States
Oklahoma Station Ballroom 4
1:45-4:00 PM
"State of the States" brings together leaders from across the country to share the latest developments in college savings programs. Representatives will highlight innovative marketing strategies, program enhancements, and key lessons learned. This session offers a valuable opportunity for peer exchange, helping states learn from one another, identify emerging trends, and strengthen their efforts to better serve families and expand participation.

Thursday, June 18
Leveraging the media buzz of Trump Accounts to drive 529 & Auto-IRA saving
Oklahoma Station Ballroom 4
8:30-9:15 AM
There is a lot of media buzz around Trump Accounts (many like to call them 530A Accounts). Many in our industry see this as a distraction. But we should see this as an opportunity to ride the media coat tails to drive savings in our plans or programs. This session will discuss the ways our industry and individual plans/programs can best capitalize on the buzz around these accounts.