



Planning to submit a proposal for TMTS 2021? 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. Official submissions must be made online at www.nast.org/proposals.

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

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

Step 2 – Then fill in the following information:

- Session title (No more than 10 words)
- Session description and learning objectives (Between 40-80 words)
- Skill level (Intermediate or Mastery)
- Description of the audience engagement, such as Q & A, group discussion, activity, or live polling.
- Facilitator’s information (This person may or may not be a speaker, but this is the person with whom NAST will contact about this session.)
- Suggested or confirmed speaker information

Suggested Track Topics:

To help you plan your submissions for TMTS, here are some topics that NAST members have identified as areas where specific training is needed. These topics are not required, but have been identified as high need.

ABLE Savings Plans

- Legislative and regulatory updates
- Investment strategies, governance and fiduciary responsibilities
- Outreach to families, eligible participants, social services
- Marketing, branding and messaging

College Savings Plans

- Legislative and regulatory updates
- Administration
- Marketing
- Structure and use of college savings plans through innovation and technology

Financial Education & Empowerment

- Best practices, successes and outreach strategies for statewide Financial Education programs for students, children and adults
- Ideas for incorporating Financial Education into other Treasury programs/agencies
- Statewide legislation regarding financial education requirements including discussion on funding, commissions/councils, etc

State Debt Issuance

- Municipal securities
- Issuance and post-issuance compliance
- Investor relations and disclosure
- Ratings and risks
- ESG and “Green” bonds
- Infrastructure funding
- Policy and research updates that improve the issuance and management of state debt

Innovations & Trends in the Treasury

- Working in a COVID world
- Technology and security, fraud, data privacy, AI
- Treasury Management Systems
- Blockchain, virtual currencies, cloud computing, IoT
- Operational issues, such as continuity of business operations, governance, HR/employment
- Workforce development, Employee training
- Intergenerational workplace issues
- Retirement Security
- Executive Treasury Management
- Leadership and Governance

Investments & Cash Management

- Payment Innovations
- Collateral Management
- Treasury Operations
- Financial Fraud
- Economic Update
- Investment Management
- Regulations
- Cash Forecasting
- ESG and Sustainable investing
- COVID-19

Unclaimed Property

- Legal Trends and Legislation
- Fraud Prevention and Detection
- Technology Innovations
- Holder Outreach and Communications
- Audits
- Claims Processing
- Marketing and Communications
- Compliance and Reporting
- COVID-19