

## 2021 TMTS Virtual Conference Program

(Text subject to change).

**Click the side arrows to browse the program,  
or click on the track of interest and jump to that section.**

Upon registering you will be sent an email with a link to the online program with speaker information and links to each session. We encourage you to attend the Kick Off sessions to learn more about the conference.

### [ABLE Savings Plans](#)

Thursdays in June at Various Times

### [Banking & Cash Management](#)

Tuesdays in June at 12 Noon ET/11am CT/10am MT/9am PT & 2pm ET/1pm CT/12 noon MT/11am PT

### [College Savings Plans](#)

Monday-Friday, May 10-14 at Various Times

### [Financial Education & Empowerment](#)

Wednesdays at 12 Noon ET/11am CT/10am MT/9am PT

### [Innovations & Trends in the Treasury](#)

Mondays at 2pm ET/1pm CT/12 noon MT/11am PT

### [Retirement Security](#)

Monday-Friday, June 21-25 at 12 Noon ET/11am CT/10am MT/9am PT

### [State Debt Issuance](#)

Mondays & Wednesdays at 4pm ET/3pm CT/2pm MT/1pm PT

### [Technology & Cybersecurity](#)

Wednesdays at 2pm ET/1pm CT/12 noon MT/11am PT

### [Unclaimed Property](#)

Tuesdays & Thursdays May 18-27th starting at 12 Noon ET/11am CT/10am MT/9am PT

## Welcome Sessions

### **TMTS Kick off Session**

**Monday, May 10 at 12 Noon ET/11am CT/10am MT/9am PT**

NAST President Treasurer Kelly Mitchell (IN) and Program & Learning Committee Chair Treasurer Shawn Wooden (CT) will welcome registrants to start the eight weeks of the TMTS with 70 hours of online programming and almost 10 hours of networking. Hear from NAST staff as they review the nine tracks so you don't miss out on any sessions pertinent to your job and to learn new skills. Special guests are encouraged to participate through polling, discussions and during the Q & A. Be sure to join us for the networking events to expand your networks.

### **National Institute of Public Finance (NIPF) Welcome & Overview**

**Wednesday, May 12 at 12 Noon ET/11am CT/10am MT/9am PT**

While NIPF has been postponed until summer 2022, we are bringing you a mini-version with four sessions during TMTS. Join this introductory session to hear from the institute chairs and academic leaders who will provide highlights of the other sessions in this mini-institute. Kick off NIPF a year early by attending these live events. See below for a list of the sessions hosted by NIPF leadership.

## Networking Events at TMTS

We know you everyone misses F2F networking events and we look forward to hosting them again. In the meantime we are hosting a number of virtual events so you can meet new colleagues, hear from old friends, and share your news. These events are open to any attendee so click on the link and join in the Zoom room fun. There may be happy hours, break-out rooms, moderated conversation, trivia, treasure hunts, and other surprise guests!

### **CSPN Networking Events**

**Monday, May 10 at 3:30-5pm ET/2:30-4pm CT/1:30-3pm MT/12:30-2pm PT**

**Friday, May 14 at 2-3pm ET/1-2pm CT/12-1pm MT/11-12pm PT**

**Tuesday, June 8 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*Join your fellow CSPN members and other conference participants for these virtual networking events. Attendees will get the chance to network with other professionals in the 529 community in an informal setting using Zoom Breakout Rooms.*

### **First Timers & New to NAST Networking Event**

**Tuesday, May 18 at 4-5pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

**Welcome Sponsor: Invesco**

*Everyone is welcome to attend this event, but we especially invite our first timers and others new to NAST. Joining us is third-generation psychic Michael Gutenplan for a mind reading show with magic. He'll entertain us for the first 30 minutes followed by breakout Zoom rooms where*

*he'll pop if for an extra trick or two. If you are working from home your family is invited. Come prepared to be mesmerized!*

### **NAUPA Networking**

**Thursday, May 27 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

### **ABLE Networking Events**

**Thursday, June 3 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

**Thursday, June 24 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*Join your fellow NAST ABLE Committee members and other conference participants for these virtual networking events. Attendees will get the chance to network with other professionals in the ABLE community in an informal setting using Zoom Breakout Rooms.*

### **Closing Networking Event - Italian Wine Tasting**

**Tuesday, June 29 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*For the last "after-hours event," a few of our former State Treasurers will host the closing networking event. They have invited a sommelier to assist in the fun and add a learning element to the hour. We'll learn the difference between a Pinot Noir and a Pinot Grigio, other than one is red and the other white. Polish your crystal, set out a bowl of nuts and olives, and we'll get down to business of learning about body, brix and brut.*

*We suggest you take this list to your local wine shop so you can follow along at home!*

#### **Italia Wine 101**

Wine #1: **Prosecco** (Sparkling, Grape: Glera; Region: Veneto) Variation: Add Aperol or Campari to make a Spritz! Also requires ice and either lemon or orange twist.

Wine #2: **Gavi** (White Wine, Grape: Cortese, Region: Piedmont) Any wine labeled Gavi, Cortese di Gavi, or Gavi de Gavi.

Wine #3: **Any Italian Rose** - any grape or region!

Wine #4: **Dolcetto** (Grape Dolcetto, Region: Piedmont)

Wine #5: 100% Tuscan **Sangiovese** such as Chianti, Chianti Classico, Rosso di Montalcino, Brunello di Montalcino (Grape: Sangiovese, Region: Tuscany)

Special Wine: **Amaro** (Any Amaro such as Nonino, Ramazzotti, Montenegro, or Fernet.)

## **NIPF Sessions at TMTS**

### **NIPF Session: Leadership in the Pandemic Environment: Challenges Faced and Lessons Learned**

**Monday, June 7 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Research has identified three major challenges that have confronted organizational leaders over the last year that must be addressed effectively as we create the new normal in a post-Pandemic era. These challenges include the operational impact of the pandemic and a leader's responses to it; the intersection of lessons learned and organizational culture; and leadership considerations going forward. This NIPF session will be a dynamic dialogue among*

*Treasurers and recognized leadership scholars exploring their experiences, providing an opportunity to identify and discuss exemplary practices and / or significant considerations for treasury management organizations in the future.*

**NIPF Session: Identifying and Navigating Key Challenges and Strategies for Public Finance**

**Monday, June 14 at 4pm ET/3pm CT/2pm MT/1pm PT**

*This session will review key challenges and strategies in the Public Finance Domain. A great teaser for what thought leadership will be highlighted in the National Institute for Public Finance's (NIPF's) Public Finance Track. Topic areas include: measuring revenue shortfalls / expense increases; defining the new demands for services / infrastructure; Leveraging state and local finance as a growth / recovery engine; and prioritizing policy advocacy.*

**NIPF Session: Environmental, Social and Governance (ESG) Integration of Best Practices and Relevant Frameworks to Build Resiliency for the Post-Covid World**

**Tuesday, June 15 at 12 Noon ET/11am CT/10am MT/9am PT**

*ESG has been long discussed yet it is being cited that the current Covid environment has been the catalyst to look at ESG not as an aspiration to achieve but for risk management and a sound business approach. This session will be an interactive and practical conversation with cross-border thought leaders discussing the reasons an ESG-focus ensures resiliency and an enhanced risk management approach for organizations. This is a timely conversation that will incorporate leading academic research, notable aspects of the current federal administration focus on climate as well as broader ESG mandates, and the need to be able to build sustainability in investment portfolios by those government organizations that are fiduciaries for these long-term pools of capital.*

**NIPF Session: U.S. Infrastructure in the Age of Pandemic: How the Growth Curve of the Infrastructure Asset management Industry has been Accelerated by the Pandemic**

**Tuesday, June 15 at 2pm ET/1pm CT/12 noon MT/11am PT**

*\*Historical review of the Private Equity, Hedge Fund & Private Credit industries' growth curve - and compare and contrast to Infrastructure:*

- Development of asset class characteristics & definitions along the growth curve timeline;
- Acceleration of asset allocation trends & asset class specialty funds in PE, HF & PC; and
- Compare and contrast other alternatives asset class growth curves of Private Equity (1970s-1980s), Hedge funds (1990s-2000s), and Private Credit (2000s-2010s), with that of Infrastructure Asset Management (2010s-2020s).

*\*Discussion on Growth Curve of Infrastructure has been accelerated by the Pandemic*

*\*Review of Infrastructure Trends - policy and investment segments*

## **ABLE Savings Plans**

Thursdays in June

**Thank you to our track sponsors AKF Consulting and Ascensus**

### **Celebrating the 5 Year Anniversary of the Launch of ABLE Programs and ABLE's Positive Impact on the Lives of People with Disabilities**

**Thursday, June 3 at 1-2:15pm ET/12-1:15pm CT/11-12:15pm MT/10-11:15am PT**

*The First ABLE programs launched in the summer 2016. This panel discussion will revisit the advocacy efforts in bringing the ABLE Act into a law, the challenges in creating a first-of-its-kind savings and investment account, and lessons learned from the beginning of ABLE outreach. We will hear from special guests, including one of the first ABLE account enrollees on how the program has impacted their life. The panel will also celebrate how far all of the ABLE programs have come in just five years and our uniting together through the National Association of State Treasurers in a common mission - providing People with Disabilities across the country the opportunity for greater inclusion and improving their quality of life.*

### **Best Practices for Virtual and In Person Presentations and Events**

**Thursday, June 3 at 2:30-3:30pm ET/1:30-2:30pm CT/12:30-1:30pm MT/11:30-12:30pm PT**

*A variety of ABLE Programs will speak on the best successes they have had in virtual and in person Events. We will explore accessibility issues, formats, and partnering with organizations and groups in order to reach your desired audiences.*

### **ABLE Networking Event in Zoom Breakout Rooms**

**Thursday, June 3 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*Join your fellow NAST ABLE Committee members and other conference participants for this virtual networking event. Attendees will get the chance to network with other professionals in the ABLE community in an informal setting using Zoom Breakout Rooms.*

### **Partnering with Employers to Increase Enrollment for ABLE Accounts**

**Thursday, June 10 at 1-2pm ET/12 noon-1pm CT/11-12 noon MT/10-11am PT**

*This session will share how one state collaborated with their 529 College Savings Plan to create greater opportunities for outreach to employers. In addition, panelists will include employers who are currently offering information on ABLE to their employees. Attendees will learn about various employer motivations and experiences to help guide and be more effective in their outreach to employers going forward.*

### **Opening ABLE Accounts for Foster Kids**

**Thursday, June 10 at 2:15-3:15pm ET/1:15-2:15pm CT/12:15-1:15pm MT/11:15-12:15pm PT**

*Who can legally open an account for a kid in foster care? It's complicated. But not impossible! Oregon State Treasury has partnered with Oregon's Department of Human Services to find a way to open and manage accounts in DHS' care. We'll talk about the different legal and bureaucratic hurdles we ran into and how we overcame them to help the audience figure out how to make this a reality in their states.*

**Expanding ABLE Through Different Types of Collaboration****Thursday, June 10 at 3:45-4:45pm ET/2:45-3:45pm CT/1:45-2:45pm MT/12:45-1:45pm PT**

*Every ABLE Plan faces the challenge of how to get the word out – whether through advertising, earned media or public outreach. Data has shown us that our efforts are more successful when the ABLE message is delivered in an integrated fashion with disability-centric organizations and other community partners. This panel will provide examples of successful collaboration – specifically across States and the legal community – with thought leaders and organizations focused on the disability community. Attendees will also gain knowledge of how to engage the legal community for partnership opportunities.*

**Protecting your ABLE Account from Fraud****Thursday, June 17 at 1-2pm ET/12-1pm CT/11-12pm MT/10-11am PT**

*Hear from ABLE and financial industry experts on how to help account owners protect their ABLE accounts. Learn about steps that account owners can take to ensure online accounts remain secure and account owners' debit or cash cards are not used for unauthorized withdrawals.*

**ABLE Investment Structures: Does Your 2016 Design Still Work Today?****Thursday, June 17 at 2:15-3:15pm ET/1:15-2:15pm CT/12:15-1:15pm MT/11:15-12:15pm PT**

*In this session, panelists will overview current ABLE investment philosophy and structure, and share new disability consumer data to help consider and prepare for the future of ABLE investment portfolio design. Full Description: It has been five years since the first ABLE program launched. At that time, little was known about the disability saver and investor, so portfolio line-ups generally were designed to be simple, while providing a small range of static options. Diversified asset allocation and passively managed investment strategies minimize risk for what has been perceived to be a more risk-averse disability investment community. Unlike a typical 529 college saver's time horizon, the ABLE investor's time horizon is considered to be variable, from a month to a lifetime. But do these considerations still hold true? Questions to be addressed: What have we learned about disability customer behaviors and choices? Does a simple investment structure still apply? What about the cash, liquid and/or money market options? With little to no return and cost to programs to offer the option, who does it benefit? Customers? Programs? What changes should Programs be considering?*

**The IRS Has Adopted Final ABLE Regulations - Should I Be Concerned?****Thursday, June 17 at 3:45-4:45pm ET/2:45-3:45pm CT/1:45-2:45pm MT/12:45-1:45pm PT**

*This session will focus on the anticipated issues in implementing the final ABLE Regulations. We will discuss key provisions of the final regulations and offer insight to their application.*

**Reaching Rural America****Thursday, June 24 at 1-2pm ET/12-1pm CT/11-12pm MT/10-11am PT**

*Rural America has a lot more diversity than it's often given credit for. We'll take a look at the diversity making up our country's ranching, logging, fishing, farming and tribal communities. Once we learn more about who makes up rural America, a panel of experts will help us understand key differences and similarities between different communities, and the best ways of reaching them.*

**National ABLE Data 2.0****Thursday, June 24 at 2:15-3:45pm ET/1:15-2:45pm CT/12:15-1:45pm MT/11:15-12:45pm PT**

*This session will continue our look at the story of what ABLE program data tells us by comparing the data that was collected in 2020 to 2021 data. The session will provide an analysis of data collected from national ABLE programs in order to learn more about current and future trends in ABLE plan enrollment, contributions, disbursements, and other statistical characteristics that may assist with forecasting for the future and building greater sustainability. During this session there will be discussion regarding consideration for future data collection based on the final regulations as well as an examination of specific data sets that may assist ABLE programs nationwide in forwarding legislative efforts. This session will also feature a presentation of data-based outcomes achieved from promising practices by ABLE programs.*

**ABLE Networking Event in Zoom Breakout Rooms****Thursday, June 24 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*Join your fellow NAST ABLE Committee members and other conference participants for this virtual networking event. Attendees will get the chance to network with other professionals in the ABLE community in an informal setting using Zoom Breakout Rooms.*

## **Banking & Cash Management**

**Tuesdays in June at 12 Noon ET/11am CT/10am MT/9am PT  
& 2pm ET/1pm CT/12 noon MT/11am PT**

**Thank you to our track sponsors Fidelity Investments, KeyBank, PFM, State Street, TD Bank, US Bank and Wells Fargo**

### **A New World of Opportunity: Investing as a QIB**

**Tuesday, June 1 at 12 Noon ET/11am CT/10am MT/9am PT**

*The SEC recently adopted a final set of rule amendments that allow many federal, state and other governmental entities to invest in Regulation D and Rule 144A private securities offerings. The private securities markets are among the largest and fastest-growing segments of the market. With this amendment, public entities have the potential to further diversify their portfolios and improve investment results. Learn more about the benefits of including these types of securities in your portfolios.*

### **Managing Investment Risk in a Post Pandemic World**

**Tuesday, June 1 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Mark Twain famously said history never repeats but sometimes it rhymes. After the 1918 Pandemic, technological advances, increased employment and cheap credit lead to excessive consumerism and the roaring 20s. The stock market crash of 1929 and low employment lead to the Great Depression. Fast forward to the COVID 19 pandemic, federal stimulus has bolstered economies and kept interest rates low. To combat declining capital market assumptions, portfolio managers have taken on more risk in a desperate attempt to obtain a reasonable rate of return to fund maturing liabilities. The panel will examine CalPERS portfolio strategy, emerging trends amongst local agencies and risk mitigation efforts to diminish portfolio risk, related liabilities and their potential broader impact on state budgets.*

### **Technology Innovations in the COVID Era**

**Tuesday, June 8 at 2pm ET/1pm CT/12 noon MT/11am PT**

*A discussion on how large governments are adjusting to the accelerated adoption of digital payment collections in the Covid environment. Learn how attendees can optimize their workflows with technology and prevent common issues such as logging into multiple portals and downloading information into Excel. Single source technology provides: - Visibility into all your bank statement data - Forecast and reconcile your account activity. - Invest excess cash. - Manage compliance and workflow. - Generate business intelligence reporting.*

### **Digital Transformations: Technology and Personnel**

**Wednesday, June 9 at 2pm ET/1pm CT/12 noon MT/11am PT**

**Welcome Session Sponsor: JP Morgan**

*The pace at which technology adapts is growing exponentially and dramatically shifts how the world perceives value. Driven by constituent expectations and the changing regulatory environment, these new technologies are redefining the ways in which government agencies approach finance. These transformations also affect treasury personnel who are being pushed*



*to think and work differently in order to thrive professionally. In this session, we will explore how treasury organizations need to evaluate staff capabilities, matching skill sets to new job functions impacted by emerging technology. We will also explore what your agency can do to embrace these new technological opportunities. We will dive into recent market trends related to emerging payment methods, the benefits of adding new payment tools, what to consider in your payment acceptance strategy given the current environment, and how to modernize payment capabilities without embarking on a massive project. Hear from leaders on these issues from Bank of America and J.P. Morgan.*

**NIPF Session: Environmental, Social and Governance (ESG) Integration of Best Practices and Relevant Frameworks to Build Resiliency for the Post-Covid World**

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**The COVID-19 Stimulus Horizon**

**Tuesday, June 22 at 12 Noon ET/11am CT/10am MT/9am PT**

*Over the past year states have received billions of dollars in federal COVID-related stimulus funds, which have buoyed otherwise challenging state budget outlooks. Between ARPA and potential future infrastructure bills, federal funding is not running out in the near future.. This panel will explore key challenges and opportunities for deploying these funds, including the need to plan ahead for a potential "cliff," of federal funds. Learning Objectives: a) What is the outlook for public sector budgets over the next few years; and b) How can treasury functions play a role in short-term management of these funds, and in affecting the anticipated*

*“cliff” that could come in a post-stimulus era.*

### **More Optimism with a “Highly Uncertain” Path**

**Tuesday, June 22 at 2pm ET/1pm CT/12 noon MT/11am PT**

**Welcome Session Sponsor: Federated Hermes**

*While the economy is re-emerging from the most extreme shock in recent history, the rates picture remains grim as the Federal Reserve combats multiple headwinds that are suppressing growth and inflation. The Federal Reserve’s near-zero rate policy, quantitative easing and a myriad of backstop programs combined with record fiscal stimulus lifted the economy from the depths of recession during the peak of the Covid crisis but the recovery is not yet complete and recent data reflects slowing as we enter the second wave of Covid. While the hope of a more normal economic environment seems near given the potential for vaccines, the hope of higher inflation necessary to lift interest rates higher still seems distant given the current headwinds. With this backdrop, Kerry will overview market conditions and investors reactions to the heightened uncertainty. Kerry will also discuss the planned conversion from LIBOR to SOFR.*

## **College Savings Plans**

**Monday-Friday May 10-14**

**Thank you to our track sponsors AKF Consulting, Dimensional Fund Advisors, Great Disclosure, Invite Education, PFM and The Vanguard Group**

### **CSPN – 529 Primer**

**Monday, May 10 at 1-2pm ET/12-1pm CT/11-12pm MT/10-11am PT**

*What is Section 529 of the Internal Revenue Code? This session has proven beneficial for both new and regular attendees and is designed to cover the basic requirements of the statute; what is meant by the various terms and definitions found in Section 529; and an overview of gift and estate tax rules applicable to 529 accounts.*

### **CSPN Kickoff Session**

**Monday, May 10 at 2:15-3:15pm ET/1:15-2:15pm CT/12:15-1:15pm MT/11:15-12:15pm PT**

**Welcome Session Sponsor: Ascensus**

*Join us for the first session of the track!*

### **Coffee Chats – Zoom Meeting with Breakout Rooms**

**Monday, May 10 at 3:30-5pm ET/2:30-4pm CT/1:30-3pm MT/1:30-3pm PT**

*Join your fellow CSPN members and other conference participants for this virtual networking event. Attendees will get the chance to network with other professionals in the 529 community in an informal setting using Zoom Breakout Rooms.*

### **25 Years Of 529**

**Tuesday, May 11 at 12 noon-1:30pm ET/11-12:30pm CT/10-11:30am MT/9-10:30am PT**

**Welcome Session Sponsor: TIAA**

*2021 marks the 25th anniversary of the inclusion of Section 529 in the Internal Revenue Code. This session will provide a retrospective overview of the first 25 years of 529 College Savings plans – including the growth of plans, accounts, and dollars saved; changes to fees and investment features; expansion of 529 allowable expenses; and other features. Join industry leaders to hear and reflect on the passage of Small Business Job Protection Act of 1996 and the establishment of Section 529 of the Internal Revenue Code. Learn about the history of college savings prior to 1996, how much the college savings industry has grown and flourished since and where opportunity may lie in the future.*

### **Creating a Culture of Education: Building legends or busting myths?**

**Tuesday, May 11 at 1:45-2:45pm ET/12:45-1:45pm CT/11:45-12:45pm MT/10:45-11:45am PT**

*With a recent shift in a collective mindset around jobs, careers, funding, tuition debt and higher ed attendance, we need to educate the public about the first line of offense for a 529 plan: why education and training matter. Higher education will meet a new competitive nemesis. The competition is not among students to get in, but among institutions to be desirable and worth the cost as perceived by the public. The nemesis is the value of education. Universities will compete with trade, tech, apprenticeships and colleges for admission and student loyalty. We cannot*

*ignore additional factors of life experience, inherited careers in agriculture and trades, and a decline in birth rates.*

*While institutions market high school students, we seek parents to put a stake in the ground at the birth of their children. How and when do we appeal to, or shape, their values and beliefs about higher education? How do we create a culture that values education? How can we leverage Personas to relate to different personalities and their inherent barriers to saving in a 529 plan?*

### **Marketing 529: Competing in a Virtual World: Best marketing strategies for 2021 and beyond**

**Tuesday, May 11 at 3:15-4:45pm ET/2:15-3:45pm CT/1:15-2:45pm MT/12:15-1:45pm PT**

*According to the Interactive Advertising Bureau and PricewaterhouseCoopers, total domestic internet advertising was over \$108 billion in 2018. As the pandemic forced everyone to move to virtual school and work environments in 2020, the digital landscape became even more crowded. As 529 administrators try to compete for digital space, what are some key considerations on how to strategically allocate their resources. During this session, panel experts will discuss current digital marketing trends, effective channels (video, podcasts, paid social, display), tools for measurement, ethical considerations. The importance of knowing your audience, tailoring the messages to meet the desired audience, and knowing where they are in the buying cycle will also be discussed along with tactics to reach rural and under-represented populations.*

### **529s in the workplace - Ideas for growing your employer channel**

**Wednesday, May 12 at 1:15-2:15pm ET/12:15-1:15pm CT/11:15-12:15pm MT/10:15-11:15am PT**

*Share the importance of and goals for employer outreach and an overview of what many states are doing now to bring 529 plan resources to families through the workplace. During this session, we'll hear from our panelists on how they have moved the needle in employer engagement and examine various reasons employers are interested in raising awareness and the use of 529 college savings plans.*

*Session Outcomes:*

- Attendees will leave this session with a variety of ideas they can implement.*
- Attendees will leave with actionable ideas to increase chances of getting a foot in the door with employers of all sizes by pursuing strategies that go beyond traditional engagement with Human Resource departments only.*

### **Investment Trends: Keeping Fiduciary Duties at the Forefront**

**Wednesday, May 12 at 2:45-3:45pm ET/1:45-2:45pm CT/12:45-1:45pm MT/11:45-12:45am PT**

*This session will explore the fiduciary role States play with regard to the investments in 529 programs. Specifically, we will address stewardship considerations from a variety of perspectives, beginning with the evaluation of material financial and nonfinancial factors facing a State sponsor and the market efficiencies versus cost considerations investment consultants review. We will conclude with best practices for prudent oversight to provide takeaways for all*

529 professionals.

### **No, It Wasn't Just a Bad Dream: Remembering Lessons from a Year We'd all Rather Forget**

**Wednesday, May 12 at 4-5pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*How has COVID changed 529 programs and plans? This session will investigate what COVID has taught us about changes in the workplace, higher education, account owner needs and the 529 legal landscape. How were COOP plans implemented, what went right and what challenges were faced? How have industry groups adapted? How has virtual education changed how 529 accounts are used? The session will discuss how 529 plans responded to the COVID environment and will identify any improvements that may survive once COVID has passed.*

### **Understanding and Reaching Diverse Audiences**

**Thursday, May 13 at 12 noon-1:30pm ET/11-12:30pm CT/10-11:30am MT/9-10:30am PT**

*According to the Pew Research Center the United States is more racially and ethnically diverse today than it ever has been, and it is projected to be even more diverse in the coming decades. Our country's diverse families also bring a wide range of financial products knowledge, savings perceptions, and media consumption habits. During this session, participants will learn about the different approaches states like Illinois, California, and Oregon have taken to reach these diverse audiences, along with Purple Group, a full service multicultural marketing firm, who will share insights about marketing to diverse families.*

### **The Theory and Practice of Financial Education: How and Why to Incorporate it into Your State's 529 College Savings Plan**

**Thursday, May 13 at 1:45-2:45pm ET/12:45-1:45pm CT/11:45-12:45pm MT/10:45-11:45am PT**

*Once a niche idea, financial education has grown in scope and reach. We all know the importance of financial education, but what exactly does it mean? And why is it important to incorporate it into our work with 529 college savings plans? In this panel session, presenters will define the various aspects of financial education, provide a background of the industry and overview of the "current state" of financial education. They will also share the topics that are most important for families trying to navigate the college process and how this education can be deployed to constituents through teaching, coaching, and marketing.*

### **The Changing Face of 529 Plans**

**Thursday, May 13 at 3:15-4:45pm ET/2:15-3:45pm CT/1:15-2:45pm MT/12:15-1:45pm PT**

*This session will focus on changes in the way we construct investment offerings, operate, administer, and market 529s in light of recent and significant legislative changes to Section 529 and related state laws. We will discuss industry-wide data and hear from state administrators and program managers on their experience in and strategies for meeting changing investor needs and expectations under the "new" Section 529.*

### **State of the States**

**Friday, May 14 at 12 noon-1:30pm ET/11-12:30pm CT/10-11:30am MT/9-10:30am PT**

*Join us to learn all about the great things happening with 529 plans across the states. From creative marketing initiatives to inspirational customer stories, you'll learn how states are taking innovative steps as well as tried-and-true approaches to reach, educate, and empower families to save for their children's future in this complex 21st century world. States will share on a variety of topics including responses to recent changes in federal 529 legislation, state-level policy initiatives, program-specific innovations, and new platforms and mediums. The goal of this session is to share insights and learn from others on how we are all working to help families take action to help curb the largest student loan debt burden in US history, which is currently \$1.6 trillion dollars and growing.*

### **Coffee Chat – Zoom Meeting with Breakout Rooms**

**Friday, May 14 at 2-3pm ET/1-2pm CT/12-1pm MT/11-12pm PT**

*Join your fellow CSPN members and other conference participants for this virtual networking event. Attendees will get the chance to network with other professionals in the 529 community in an informal setting using Zoom Breakout Rooms.*

### **Coffee Chat – Zoom Meeting with Breakout Rooms**

**Tuesday, June 8 at 4-5pm ET/3-4pm CT/2-3pm MT/1-2pm PT**

*Join your fellow CSPN members and other conference participants for this virtual networking event. Attendees will get the chance to network with other professionals in the 529 community in an informal setting using Zoom Breakout Rooms.*

### **Fintech for Government – Stories of Successful Public-Private Collaboration to Modernize the Delivery of Government Services (Joint session with Technology & Cybersecurity)**

**Wednesday, June 23 at 2pm ET/1pm CT/12 noon MT/11am PT**

*“Government is back” could be the watchword for the Biden Administration, but now more than ever, government needs help. Technology is rapidly transforming almost every aspect of our lives, and the provision of government services is no exception. John Mitchell, Director of College Savings in Illinois, will moderate a wide-ranging discussion of successful examples of public-private collaboration between government entities and fintech startups. my529 Executive Director Richard Ellis and Backer CEO Jordan Lee will explore the unique challenges and opportunities presented by a 529 program working with a fintech startup. Jimmy Chen, founder and CEO of Propel, will share his lessons learned in improving the financial health of millions of families who receive SNAP benefits (food stamps) with their Fresh EBT app. Amira Yahyaoui, founder and CEO of Mos.com, will share how her company has leveraged technology to radically simplify the financial aid qualification and scholarship discovery process for today's generation of college students. Please come with questions on how your program can build fruitful points of collaboration with fintech companies to reach a wider audience of families.*

## **Financial Education & Empowerment**

**Wednesdays at 12 noon ET/11am CT/10am MT/9am PT**

**Thank you to our track sponsors Fidelity Investments and Wells Fargo**

### **Using Digital Financial Wellness to Increase Access, Drive Scale and Enable Measurement**

**Wednesday, May 19 at 12 noon ET/11am CT/10am MT/9am PT**

*Digital financial wellness programs offer a powerful way to reach your audience and can offer robust tracking and reporting, and the ability to scale. Choosing the right platform is essential, but of greater importance is building and executing an engagement and evaluation strategy that will meet your program goals and objectives. In this session, the Massachusetts Office of Economic Empowerment and the Finance Authority of Maine will share what they've learned from the experience of implementing a financial wellness digital platform, with a specific emphasis on program evaluation, data collection, defining metrics, and evaluating overall program success.*

### **Strategies for Employee Financial Resilience in a Changed World**

**Wednesday, May 26 at 12 noon ET/11am CT/10am MT/9am PT**

*Join us to discuss successful strategies public sector employers are utilizing to help their employees recover from unprecedented financial stress and build financial resilience amid a global pandemic and the associated economic crisis. Learn about the latest research on the impact on COVID-19 on public sector employees' financial outlooks, understand the importance of financial wellness as part of a holistic approach to improving employee well-being, and hear from two jurisdictions participating in a new grant program designed to help states and localities develop and strengthen employee financial wellness.*

### **Building Greater Racial & Social Equity Through Financial Education**

**Wednesday, June 2 at 12 noon ET/11am CT/10am MT/9am PT**

*Three preeminent researchers in the field of financial education for young people will show how their work focusing on payday lending, student loans and teacher professional development can help build greater racial and social equity in our society. Treasurers and their staff will have a firm grounding of what works and how they can make an impact in these areas in their respective states.*

### **Major Themes from Five Financial Education Policy Convenings**

**Wednesday, June 9 at 12 noon ET/11am CT/10am MT/9am PT**

*Chris Caltabiano, Chief Program Officer for the Council for Economic Education, and Chris Shannon, Vice President for the National Endowment for Financial Education, will review the major takeaways, action steps and overarching themes that surfaced as a result of five national financial education policy convenings they held in January and February of 2021.*

*Gain insights resulting from cross-sectorial discussions centered on the following topics:*

*- Creating more culturally-responsive content and approaches to financial education*

- *Examining assumptions and biases in financial education*
- *What research tells us about effective financial education*
- *Optics matter—the need for field alignment*
- *Building a research agenda for impact*

### **From Information to Action: Behavioral Tactics for Promoting Financial Health**

**Wednesday, June 16 at 12 noon ET/11am CT/10am MT/9am PT**

*Financial education programs often increase participants' knowledge about financial matters, but don't always translate into concrete actions that participants can take towards achieving their financial goals. Behavioral science offers a set of strategies to foster “just-in-time” learning and promote action, from heuristics (rules-of-thumb) to personalized goal-setting to mental contrasting tactics. This session will highlight key behavioral concepts that can be embedded in financial health programs and tools to engage, affirm, and actively enhance financial well-being.*

### **New Research Findings on College Savings from State-Level Child Development Accounts**

**Wednesday, June 23 at 12 noon ET/11am CT/10am MT/9am PT**

*This panel will provide new insights into Child Development Accounts through the sharing of recent research findings from two state-level programs. Hear about the results from a baseline survey of Pennsylvania's Keystone Scholars families, which received nearly 6,000 responses. The survey provides rich insight into Keystone Scholars families, with variation across demographic subgroups including race, ethnicity, parental education, and income level. It provides baseline information on respondents' savings behavior, financial capability, and expectations for their children's postsecondary education. Hear also about the findings from the latest data out of the SEED for Oklahoma Kids (SEED OK) experiment, the most rigorous test of CDAs to date. SEED OK models a universal and automatic CDA policy, offering deposits at birth and progressive subsidies for the lowest income families. SEED OK Wave 3 research includes updated account and savings data from the Oklahoma 529 plan and findings from a survey of mothers conducted in 2020, when the children are in middle school.*

### **Emergency Savings: An Emerging Key to Unlocking Financial Security**

**Wednesday, June 30 at 12 noon ET/11am CT/10am MT/9am PT**

*A growing body of research shows that short-term savings is not only a buffer for households in case of emergency, but a critical foundation for households of all income levels to build long-term financial security. Attendees of this session will learn:*

- *The latest cutting-edge research on emergency savings*
- *The unique role states can play in increasing household emergency savings*
- *Opportunities to lead on emergency savings, including:*
  - o *Linking short-term savings to state retirement plans*
  - o *Innovative state policy reforms*



## Innovations & Trends in the Treasury

**Mondays at 2pm ET/1pm CT/12 noon MT/11am PT**

**Thank you to our track sponsors The Pew Charitable Trusts, PFM, State Street, US Bank and Wells Fargo**

### **Navigating in a Virtual World and Post COVID-19**

**Monday, May 17 at 2pm ET/1pm CT/12 noon MT/11am PT**

*From video chat staff meetings to tele-town halls, we've had to get creative to remain engaged externally and internally, with both constituents and our employees. Join us for a discussion on sharing best practices on how to remain accessible and engaging to constituents, while also maintaining open and transparent communications among staff and avoiding burnout in this new virtual world. Other workplace considerations, such as reacclimating to in-person, shared workspaces, may provide additional unexpected challenges. Join us for a lively discussion of the anticipation and challenges we face as we return to our offices post-pandemic. Hear from a panel of Treasury office communications directors and operations leaders.*

### **Five Habits of Highly Successful Public Retirement Systems**

**Monday, May 24 at 2pm ET/1pm CT/12 noon MT/11am PT**

*While there has been much discussion around the fiscal challenges of addressing unfunded state pension liabilities, less attention has been paid to the policies and practices of a well-funded public retirement system. And a shared understanding of what constitutes success for public pensions more generally, from the perspective of workers, government officials, and taxpayers, is lacking. To help fill this void, the session will identify the common characteristics and keys to comprehensive success for high performing pension plans in three states- Tennessee, South Dakota, and Wisconsin. With this assessment as a foundation, we will introduce a model framework, based on proven practices across a number of states, to provide a path to retirement security for public workers while maintaining fiscal stability and achieving inter-generational equity. Finally, practical considerations and strategies for implementation will be discussed. The panel will include a state treasure, an expert from Pew and financial analysts from the private sector.*

### **NIPF Session: Leadership in the Pandemic Environment: Challenges Faced and Lessons Learned**

**Monday, June 7 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Research has identified three major challenges that have confronted organizational leaders over the last year that must be addressed effectively as we create the new normal in a post-Pandemic era. These challenges include the operational impact of the pandemic and a leader's responses to it; the intersection of lessons learned and organizational culture; and leadership considerations going forward. This NIPF session will be a dynamic dialogue among Treasurers and recognized leadership scholars exploring their experiences, providing an opportunity to identify and discuss exemplary practices and / or significant considerations for treasury management organizations in the future.*

### **How to Prepare in Advance for a Silver Tsunami**

**Monday, June 14 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Many states are facing what has now been coined as the “Silver Tsunami” – when a large number of employees decide to retire at around the same time, including many individuals with specialized training and skills. Connecticut is among those states to experience the Silver Tsunami. Join Treasurer Wooden to discuss how these staffing concerns are being met as our reliance on automation and technology increases and our state’s feel the fiscal effects of the pandemic economy. Joining him will be researchers from Burning Glass Technology, a consulting firm that wrote a new report on the public finance sector workforce with support from the NAST Foundation.*

### **Tackling Wage and Wealth Gaps Through Behavioral Design**

**Monday, June 21 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Wage and wealth gaps have negatively impacted the financial health of women, people of color, LGBTQIA, and disabled populations for generations. Lack of representation and inclusion for these groups means that financial services and products are often designed without the needs of large swaths of the population in mind. A major driver of the wage gap lies in the workplace, where multiple biased systems can impact how individuals’ incomes grow, or fail to grow, over time. Poorly designed recruitment, promotions, onboarding, and leave policies can disproportionately affect these individuals’ wages, tenure, and future employment opportunities. The practice of behavioral design has many new insights to share on how to redesign and improve these systems to increase diversity and inclusion, and in doing so combat wage gaps that erode financial well-being for many Americans. Learn more from experts at Idea 42 and Wells Fargo for this informative session.*

### **Why Nudge? Applying Behavioral Insights to Treasury Programs**

**Monday, June 28 at 2pm ET/1pm CT/12 noon MT/11am PT**

*In this interactive session, participants will receive an overview of the Behavioral Insights Team’s EAST (Easy, Attractive, Social, Timely) Framework and its application to State Treasury programs. Participants will engage with the material, coming away with concrete ideas for how they could put behavioral insights into practice in Treasury programs. Hear from a former Oregon treasury staffer now at the Behavioral Insights Team who will be joined by other treasury staff.*

## **Retirement Security**

**Monday-Friday, June 21-25 at 12 noon ET/11am CT/10am MT/9am PT**

**Thank you to our track sponsors AKF Consulting, Capital Group, Massena Associates, and The Pew Charitable Trusts**

### **State Auto-IRAs Landscape: Building on the Trend**

**Monday, June 21 at 12 noon ET/11am CT/10am MT/9am PT**

*This introductory session will provide a summary of the automatic-IRA state program structure and features. Panelists will provide state and industry perspectives on programs that are currently operating and those working through the next steps toward implementation. Attendees will get a solid refresher on how these new state-led efforts work and what we've seen from a growth and expansion standpoint since last year's NAST TMTS Conference.*

### **State MEPs and Marketplace Models in 2021**

**Tuesday, June 22 at 12 noon ET/11am CT/10am MT/9am PT**

*The second session will provide attendees with a comprehensive understanding of state MEP programs and marketplace models, including those that are already operational as well as those currently being implemented. Panelists will cover program structure, program status, lessons learned, challenges, etc. and give attendees a chance to explore other key program designs that Treasurer's Offices are utilizing to close the retirement gap.*

### **Research & Innovation: Driving Future Success for State Retirement Programs**

**Wednesday, June 23 at 12 noon ET/11am CT/10am MT/9am PT**

*The third panel in the series will build off the concepts and information provided in the previous sessions. Panelists will drill down on new research, program features or expansions that have helped expand retirement access, improve existing programs, and can provide important opportunities for states still considering how to move forward. Attendees will hear from state programs, private-sector administrators, and investment managers on their efforts to continue innovating in this field.*

### **Turning Recommendations into Reality: How Research & Engagement Pushes Policy**

**Thursday, June 24 at 12 noon ET/11am CT/10am MT/9am PT**

*The fourth session will explore the key elements of success for conducting retirement security studies, the considerations for establishing a formal task force, opportunities and pitfalls, and how to utilize the final product and analysis to drive legislative action and next steps. Attendees will hear from Treasurers and staff that are in the process of, or recently completed reports, and learn more about how they're putting this research to work.*

### **Federal Updates & Initiatives: National Retirement Work and the Impact on States**

**Friday, June 25 at 12 noon ET/11am CT/10am MT/9am PT**

*There has been a lot of talk and discussion on a new movement at the federal level to push for expanded retirement coverage and increasing access to retirement options. The final session will focus on developments at the federal level, including rulemaking or regulatory changes, as well as the movement of any specific legislation through Congress. (SECURE Act 2.0, National Auto-IRA, etc.) Attendees will learn more about how federal initiatives interact with efforts at the state level and will also get a sense of what further action to expect from Congress and the new*

administration.

## **State Debt Issuance**

**Mondays & Wednesdays at 4pm ET/3pm CT/2pm MT/1pm PT**

**Thank you to our track sponsors BondLink, Jefferies, PFM, S&P Global and Wells Fargo**

### **ABC's of State Debt: Introduction to Municipal Bonds**

**Monday, May 17 at 4pm ET/3pm CT/2pm MT/1pm PT**

*High-level overview of debt issuance and management practices for those that are relatively new to debt issuance, veteran issuers that need a timely refresher, or anyone that has the desire to learn more about state debt. Topics covered will include determining borrowing limits on debt, the bond issuance process, different types of debt, credit ratings, disclosure, refinancing, post-issuance compliance, etc.*

### **Municipal COVID-19 Response: Swift Reactions in Ratings, Market, and Disclosure**

**Wednesday, May 19 at 4pm ET/3pm CT/2pm MT/1pm PT**

*Discussion of the rapid municipal market reaction to the outbreak of COVID-19. Market participants including rating agencies, underwriters, and disclosure counsel responded quickly and stayed nimble during a time of crisis to facilitate market access for issuers. Speakers will shed light on which changes to the market landscape are here to stay, and which are a temporary pandemic response?*

### **Updates in Infrastructure Finance**

**Monday, May 24 at 4pm ET/3pm CT/2pm MT/1pm PT**

*The past year has brought a number of changes to the world of infrastructure. Speakers will discuss a number of updates including, potential changes to federal programs like TIFIA, a switch in individual behaviors, and the COVID-19 pandemic have all changed the landscape for capital finance decisions.*

### **Alternatives to Advance Refundings: Are We Leaving Savings on the Table?**

**Wednesday, June 2 at 4pm ET/3pm CT/2pm MT/1pm PT**

*Congress eliminated tax exempt advance refunding bonds more than three years ago. In that time, issuers have turned to taxable advance refundings and other structures like Cinderella bonds, tenders, bond exchanges, and forward deliveries to achieve what savings they can. Panelists will discuss the merits of these options, other available options, and the continued need for Congress to restore tax-exempt advance refundings.*

### **The Future of Debt Financing: Where Will Rates and Inflation Go?**

**Monday, June 7 at 4pm ET/3pm CT/2pm MT/1pm PT**

*The federal government's response to the COVID crisis has been an unprecedented set of economic stimulus programs coupled with significantly increased deficit spending and an expanded Federal Reserve balance sheet. What are the fundamental factors keeping inflation at bay and will this change over time? Is there a downside risk to the federal government's*

*significantly increased spending?*

### **Ratings Roundtable: ESG**

**Wednesday, June 9 at 4pm ET/3pm CT/2pm MT/1pm PT**

*Environment, societal and governance (ESG) factors continue to rise to the forefront of discussions around risk and ratings. Representatives from major rating agencies will discuss how these ESG factors are influencing the methodology of municipal issuer ratings and what new information may be required from issuers.*

### **NIPF Session: Identifying and Navigating Key Challenges and Strategies for Public Finance**

**Monday, June 14 at 4pm ET/3pm CT/2pm MT/1pm PT**

*This session will review key challenges and strategies in the Public Finance Domain. A great teaser for what thought leadership will be highlighted in the National Institute for Public Finance's (NIPF's) Public Finance Track. Topic areas include: measuring revenue shortfalls / expense increases; defining the new demands for services / infrastructure; Leveraging state and local finance as a growth / recovery engine; and prioritizing policy advocacy.*

### **MSRB Roundtable**

**Wednesday, June 16 at 4pm ET/3pm CT/2pm MT/1pm PT**

*Maintaining an open dialogue with the MSRB is critically important for issuers and all market participants alike. Join a board member and staff representative from the MSRB for an open discussion about the Board's long-term strategic priorities.*

## **Technology & Cybersecurity**

**Wednesdays at 2pm ET/1pm CT/12 noon MT/11am PT**

**Thank you to our track sponsor Kroll Government Solutions**

### **“Days of Our Cyber Lives” Live Cybersecurity Podcast**

**Wednesday, May 19 at 4pm ET/3pm CT/2pm MT/12 noon PT**

*Join Kelly Mitchell, Indiana Treasurer of State and NAST President and Mark Wuellner, Executive Director of the Indiana Bond Bank while they record a podcast as part of their series of bringing awareness and assistance to local government units on cybersecurity issues. After the recording, Treasurer Mitchell and Mark Wuellner will go “behind the scenes” of the podcast for an interactive Q&A. Learn why podcasting makes sense for treasury offices and how to start one in 3 easy steps. Attendees can ask what it takes to put on a podcast, why do one, how to promote and distribute, etc. Come and be part of the making of a live broadcast!*

### **Is Now the Right Time to Consider a Treasury Management System?**

**Wednesday, May 26 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Many state agencies are moving quickly toward Cloud-based technology and starting to consider whether now is the time for a Treasury Management Systems (TMS). These systems are designed to offer automation and efficiency for cash management processes, minimize manual processes and the use of spreadsheets or outdated custom systems. TMS provide cash forecasting reporting, investment analysis, bank account management, automated bank connectivity, and direct payments to the bank. In this session we'll discuss the benefits of a TMS, as well as benchmarking data to determine if now is the right time for your state to make the change. We'll also talk with agency personnel who are using these solutions to better understand their journey, impact their business, and lessons learned. Join this panel of TMS experts and their customers to learn more.*

### **Cybercrime and Financial Fraud – It’s Not a Matter of If, but When**

**Wednesday, June 2 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Did you know that fraudulent payments increased over 667% last year? The 2020 Cybersecurity Study by NASCIO and Deloitte revealed that 30 states indicated financial fraud was a leading cause of breaches in the past year, compared to only 10 in 2018. Yet 54% of states reported they are not confident in their ability to address threats from emerging technology. States are truly facing a risk crisis, and many don't have the technology and processes in place to protect against these cybercriminals. Protection at the bank level is simply not enough. In this session, we'll take a look at easy to implement, effective payment screening using AI and other technologies. Some of the topics that will be answered during this session include: the nature of the breaches; strategies to obtain budgetary support; staffing and training; how will this affect credit quality; and more. Joining the panel will be representatives from KBRA and Kyriba to add the industry perspective.*

### **Digital Transformations: Technology and Personnel**

**Wednesday, June 9 at 2pm ET/1pm CT/12 noon MT/11am PT**

**Welcome Session Sponsor: JP Morgan**

*The pace at which technology adapts is growing exponentially and dramatically shifts how the world perceives value. Driven by constituent expectations and the changing regulatory environment, these new technologies are redefining the ways in which government agencies approach finance. These transformations also affect treasury personnel who are being pushed to think and work differently in order to thrive professionally. In this session, we will explore how treasury organizations need to evaluate staff capabilities, matching skill sets to new job functions impacted by emerging technology. We will also explore what your agency can do to embrace these new technological opportunities. We will dive into recent market trends related to emerging payment methods, the benefits of adding new payment tools, what to consider in your payment acceptance strategy given the current environment, and how to modernize payment capabilities without embarking on a massive project. Hear from leaders on these issues from Bank of America and J.P. Morgan.*

**Preparing Your Agency for a Social Media Cyber Attack**

**Wednesday, June 16 at 2pm ET/1pm CT/12 noon MT/11am PT**

*Ripped from the headlines -- cyber criminals are targeting social media platforms to spread disinformation, perpetrate fraud, steal sensitive information, and cause reputational damage. Government agencies need to remain vigilant, continue to recognize potential threats, and plan accordingly. This interactive session will provide an overview of the current cyber landscape – with particular focus on social media-related threats – and equip attendees with best practices and tools needed for dealing with such threats. Participants will walk through a simulated tabletop exercise scenario that will focus on an adversary takeover of a State Treasurer’s social media platform(s) and the fallout from such an attack. During the tabletop exercise we’ll incorporate audience participation via live polling and the opportunity to ask questions. Participation in this event will provide attendees with actionable processes and procedures to implement so that their agency can prepare for whatever comes their way. Fan favorite Adam Bulava from J.P. Morgan is back with a highly interactive workshop.*

**Fintech for Government – Stories of Successful Public-Private Collaboration to Modernize the Delivery of Government Services (Joint session with College Savings)**

**Wednesday, June 23 at 2pm ET/1pm CT/12 noon MT/11am PT**

*“Government is back” could be the watchword for the Biden Administration, but now more than ever, government needs help. Technology is rapidly transforming almost every aspect of our lives, and the provision of government services is no exception. John Mitchell, Director of College Savings in Illinois, will moderate a wide-ranging discussion of successful examples of public-private collaboration between government entities and fintech startups. my529 Executive Director Richard Ellis and Backer CEO Jordan Lee will explore the unique challenges and opportunities presented by a 529 program working with a fintech startup. Jimmy Chen, founder and CEO of Propel, will share his lessons learned in improving the financial health of millions of families who receive SNAP benefits (food stamps) with their Fresh EBT app. Amira Yahyaoui, founder and CEO of Mos.com, will share how her company has leveraged technology to radically simplify the financial aid qualification and scholarship discovery process for today’s*

generation of college students. Please come with questions on how your program can build fruitful points of collaboration with fintech companies to reach a wider audience of families.

## **Unclaimed Property**

### **Tuesdays & Thursdays in May**

**Thank you to our track sponsors Audit Services, Innovative Advocate Group and Kroll Government Solutions**

#### **Conference Opening and State of the States**

**Tuesday, May 18 at 12 noon ET/11am CT/10am MT/9am PT**

**Welcome Session Sponsor: Kelmar Associates**

*After a welcome from NAUPA leadership, hear from your colleagues around the world in this series of updates from our member states/nations/territories.*

#### **The Year in Review: Recent Legal Developments and Legislation Impacting Unclaimed Property**

**Tuesday, May 18 at 2:30pm ET/1:30pm CT/12:30 noon MT/11:30am PT**

*This session highlights unclaimed property case law developments and legislative enactments from all jurisdictions. Attendees will hear what's happening in other states, find out what's trending (good and bad), and maybe even learn something new.*

#### **Unclaimed Property Audits: Understanding the Relationship between States, Audit Firms, and Holders**

**Thursday, May 20 at 12 noon ET/11am CT/10am MT/9am PT**

*This panel will bring state compliance staff, third party auditors, and holders together to discuss issues and trends in the Unclaimed Property compliance space.*

#### **Why is This So Hard?**

**Thursday, May 20 at 1:30pm ET/12:30pm CT/11:30am MT/10:30am PT**

*Unclaimed property can be a source of frustration from the holder side as well as the state side. This session will work through a discussion of real life issues experienced by state representatives and holders with the goal of uncovering solutions to make the unclaimed property compliance process a little easier.*

#### **Unclaimed What?: Increasing Holder Compliance Among Small to Medium-Sized Business**

**Thursday, May 20 at 3pm ET/2pm CT/1pm MT/12 noon PT**

**Welcome Session Sponsor: Kroll Government Solutions**

*The vast majority of small to medium-sized businesses have never reported any unclaimed property, yet almost all businesses generate some type of unclaimed property in the regular*



course. Many holders fail to file out of ignorance of the law, rather than willful disregard. This panel will address best practices for bringing these types of businesses into compliance, including the methods states have used to address the challenges of reaching, educating and assisting these holders with their filings.

### **Blockchain and Cryptocurrencies: How do they Actually Work?**

**Tuesday, May 25 at 12 noon ET/11am CT/10am MT/9am PT**

*An introduction to what a blockchain is and how its primary use case, a cryptocurrency, is put together. The session will focus on the Bitcoin and Ethereum blockchains but will also touch on related topics such as consensus mechanisms, wallets, crypto trading and “stablecoins”.*

*Attendees of the session will be able to explain what a blockchain and a cryptocurrency are, and how they are used.*

### **Securing a Remote Workforce and Trends in Fraud: Lessons from 2020**

**Tuesday, May 25 at 1:30pm ET/12:30pm CT/11:30am MT/10:30am PT**

*Working remotely means more than ensuring users have the right equipment and network access. IT departments everywhere have been challenged with the task of securing a remote workforce from external attacks. Beyond remote work, fraud has been increasing during the COVID era. This session will discuss best practices and ideas for securing a remote workforce, authentication of claimants; and using LexisNexis and other external services to prove identity/ownership.*

### **Foreign Affairs: Unclaimed Property Outside and Inside the States**

**Tuesday, May 25 at 3pm ET/2pm CT/1pm MT/12 noon PT**

*Unclaimed property administration has gone global in recent years. While all unclaimed property laws share a common core, each country’s laws are unique. This session will consider challenges that all programs have in common, and how respective countries have implemented solutions. While states of domicile have assumed custody of unclaimed property due foreign owners for decades, holders are now increasingly challenging the legality of the practice. This session will review the basis for state claims, and consider objections raised by holders. It will additionally consider jurisdictional priorities where a foreign country has adopted an unclaimed property law.*

### **Claims Innovation in the COVID Era**

**Thursday, May 27 at 12 noon ET/11am CT/10am MT/9am PT**

*COVID-19 has imposed significant challenges on the ability of states to continue to operate all aspects of their unclaimed property programs during the crisis, at the same time that it has made reuniting unclaimed property with its rightful owners more important than ever. This panel will discuss how states have succeeded in overcoming the challenges they have faced during this time period including innovative ways states are returning property to the rightful owners and communicating with the constituencies they serve during the pandemic.*

### **What a Year It's Been: Updates from 2020 TMTS Topics (Sports Betting, Clearinghouse, NAUPA III, and RUUPA)**

**Thursday, May 27 at 2:30pm ET/1:30pm CT/12:30 noon MT/11:30am PT**

*This panel will revisit topics from last year's Training Symposium - providing updates on the rapidly expanding sports gaming industry, and the need for state programs to proactively address unclaimed winnings; plans to make SURCH fully operational, the importance of state participation, and review the work completed to date by NAUPA's contractor, Kelmar; the NAUPA III reporting committees significant progress with the new XML format and associated reporting codes; and the experiences of RUUPA states - what works, and what doesn't?*

**NAUPA Networking****Thursday, May 27 at 4-5 pm ET/3-4pm CT/2-3pm MT/1-2pm PT**