COLLEGE SAVINGS PLANS NETWORK
2023 PREPAID MINI-CON VIRTUAL
FEBRUARY 28 – March 1, 2023 | 1PM – 5PM ET
SPEAKER BIOS

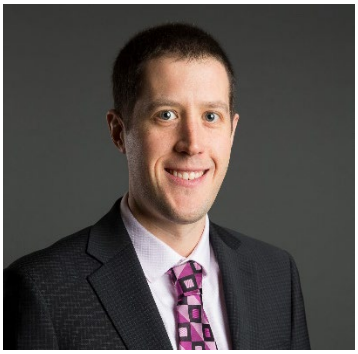
EVENT HOSTS – CSPN Prepaid Committee Co-Chairs

G. Alisa Ferguson
Associate General Counsel & ABLEnow Program Manager, Virginia529
Alisa serves as Virginia529's Associate General Counsel and Program Manager for Virginia529's Achieving Better Life Experience (ABLEnow) program. In that role, she provides legal support to Virginia529's Board of Directors, CEO, General Counsel and the staff for all Virginia529 college savings programs as well as the ABLE savings programs. She joined Virginia529 in 2011.

Prior to joining Virginia529, Alisa worked in private practice for 3 years as a trusts and estate attorney. She focused her practice in the areas of estate planning, special needs planning, and estate and trust administration.

Alisa graduated with honors from the University of Richmond School of Law. Alisa received her B.S. in Psychology with a minor in Criminal Justice from James Madison University. She is a member of the Virginia Bar Association, the Metro Richmond Women's Bar Association, the American Bar Association, and the Virginia Mountain Valley Lawyer's Alliance. She serves as a Co-chair of the CSPN Prepaid Tuition Committee, an Executive Board member of the ABLE Savings Plans Network (ASPN), Co-chair of the ASPN Strategic Planning Committee, and Co-chair of the ASPN Program Committee. Alisa is a member of the Women for Madison Executive Advisory Council for James Madison University and a past president of the Board of Directors for Medical Home Plus.

Luke Minor
Director, Washington College Savings Plans (WA529)

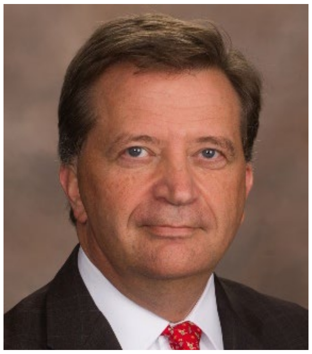


Luke is the Director of College Savings Plans at the Washington Student Achievement Council (WSAC). Luke has been with WSAC's college savings plans division since 2012 and has been in this role for three years serving as the chief administrative officer responsible for overseeing and growing Washington State's 529 Plans (WA529), which include the GET Prepaid Tuition Program and the DreamAhead College Investment Plan. Since 1998, tens of thousands of students have used more than $1.6 billion of their WA529 savings to attend colleges in all 50 states and at least 15 foreign countries.

Luke holds a MA in Public Administration from The Evergreen State College and a BA in Business Administration from Western Washington University. When he's not focused on helping other families save for future higher education expenses, Luke thinks a lot about saving and planning for his own daughter's future education goals. He also enjoys getting outside to hike, ride bikes and even slowing down to enjoy the finer things in life like splashing in a puddle or two.

SESSION 1: Growing Pains – Lessons Learned

MODERATOR



Chris McGee
General Counsel, Virginia529
Chris McGee serves as Virginia529 General Counsel and head of its Policy Division. Chris joined Virginia529 in July 2008 as Deputy General Counsel.

Prior to joining Virginia 529, Chris was in private practice for 14 years with a focus on commercial litigation and commercial transactions and served in the Office of the Attorney General. He is a graduate of the University of Richmond School of Law where he was the Executive Editor of the University of Richmond Law Review.

Before attending law school, Chris was an Associate Vice President at Sovran Investment Corporation. He was also selected for and completed Sovran Bank's commercial lending program, a full-time, year long program with an emphasis on quantitative analysis, credit policies, and loan structuring.

He regularly serves as a speaker, moderator, and panelist at national legal, 529, and ABLE industry conferences and has co-authored articles on both 529 and ABLE issues. Chris currently serves as the vice-chair of the College Savings Foundation.

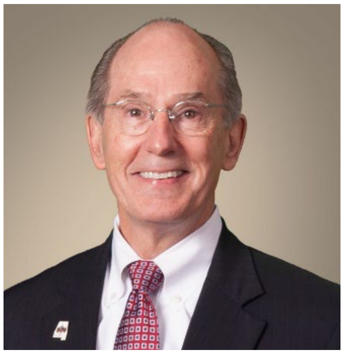
PANELISTS

Mary G. Morris
Chief Executive Officer, Virginia529

Mary G. Morris is the Chief Executive Officer of Virginia529, the largest tax-advantaged education savings program in the country with the direct Invest529, advisor CollegeAmerica programs and Defined Benefit 529 Program; Virginia529 launched tax-advantaged disability savings program ABLEnow in 2016 and ABLEAmerica in 2018. Virginia529 is developing a state-facilitated private retirement program to open by mid-2023. Virginia529 sponsors SOAR Virginia, an early commitment scholarship program, and administers a variety of scholarship and education access, affordability, and attainment initiatives to foster equity and inclusion in educational access and help make postsecondary education more affordable and accessible to all Virginians.

Mary works with the executive team to develop the strategic vision for the future and coordinates the operations, resources, outreach, and investments of Virginia529; she is involved in state and federal legislative and governance issues relating to 529, ABLE and private retirement initiatives and policy. Mary is a lawyer and spent many years in private practice specializing in tax, public finance, securities and ESG matters. In the public sector, earlier in her career she served as a Virginia Senior Assistant Attorney General for Tax and Finance and later served a term as the Treasurer of Virginia.

Mary earned her Juris Doctor and Master of Law and Taxation from the Marshall-Wythe School of Law at the College of William and Mary. She is active in both national 529 organizations, and the College Savings Plans Network where she serves on the executive leadership team as Vice-Chair and a member of the National Association of State Treasurers Legislative Committee, and the College Savings Foundation, where she is a former Board Chair and member of the Media Committee. Mary is a member of the boards of the Virginia Council on Economic Education (VCEE) and the Virginia Foundation for Community College Education (VFCCE) and a former member of the board of Junior Achievement of Central Virginia (JACV). She is a member of the Institutional Limited Partners Association (ILPA) and the Virginia State Bar. Mary is a frequent national speaker on education savings, the future of higher education and workforce training and disability savings.



Treasurer Young Boozer
State Treasurer, Alabama
Young Boozer was born in Birmingham and raised in Tuscaloosa. He earned a bachelor's degree in economics from Stanford University and a master's degree in finance from the Wharton School at the University of Pennsylvania. During the past four decades, Boozer's career in banking, finance and investments has taken him from Citibank in New York and Crocker National Bank in Los Angeles, to Coral Petroleum in Houston and Colonial Bank in Montgomery.

Treasurer Boozer also served as Deputy State Finance Director for Governor Bob Riley after his retirement in 2007. During his tenure in the Alabama Department of Finance, he played a key role in saving millions of taxpayer dollars through the restructuring of state bond debt and derivatives. Boozer left the Riley Administration in early 2010 to run for State Treasurer and was elected to two terms in that office in 2010 and 2014. In 2021, Governor Kay Ivey appointed Boozer to complete the remainder of an unexpired term and is seeking reelection to a third term beginning January 2023.

He is a member of and has held leadership roles in several organizations, including his church, the Rotary Club, the Alabama Shakespeare Festival, the Boy Scouts and Stanford University.

SESSION 2: Prepaid Plans – The Next Generation

MODERATOR

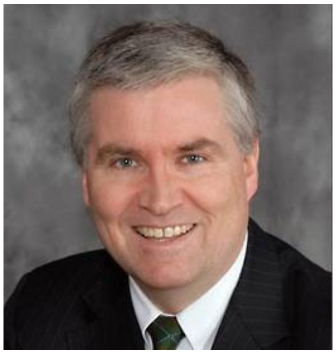
Soohyang Lee, CFA
Vice President, AKF Consulting Group
Soohyang is Vice President of AKF Consulting Group. In her role, she provides program and technical expertise on 529, ABLE and State-run Retirement Program client matters. She advises upon program matters generally including Morningstar strategic reviews, investment option changes and growth and revenue projections of 529, ABLE and State-run Retirement Programs. Additionally, she assists with various aspects of vendor procurement, including drafting and reviewing requests for proposals and providing scoring and cost analyses. She joined AKF Consulting in 2011 and has ten years of State-run Investment Program experience.

Ms. Lee graduated from the University of Virginia McIntire School of Commerce (BS in Commerce with concentrations in Finance and Accounting). She is an SEC- and MSRB-registered Municipal Advisor Representative (Series 50). Ms. Lee is a CFA charterholder.

PANELISTS

Linda Fernandez
Director, Educational Opportunities and Investments Division at the Texas Comptroller's Office
Linda is Director of the Texas Comptroller's Educational Opportunities and Investments Division which provides support to the Texas Prepaid Higher Education Tuition Board chaired by Comptroller Glenn Hegar in administering the state's prepaid tuition plans, college savings plans and the Texas ABLE® Program. She works with the Texas Match the Promise Foundation℠, a public charity that awards matching scholarships to participants of the Texas Tuition Promise Fund®.

Linda has over 40 years of experience with the state of Texas including serving as Finance Director at the State Bar of Texas and Director of Finance at the Department of Information Resources. Governor Greg Abbott appointed Linda to the State Employee Charitable Campaign Advisory Committee. She serves as a member of the Governance Committee of the National Association of State Treasurers' (NAST) College Savings Plan Network and on the executive board of NAST's ABLE Savings Plans Network. She attended the University of Texas at Austin.



Alan Perry, FSA, MAAA, CFA
Principal & Consulting Actuary, Milliman, Inc.
Alan is a principal and consulting actuary with the Philadelphia office of Milliman. He joined the firm in 1990. Alan has had primary responsibility over the last 30 years for preparing actuarial valuations and pricing analyses for prepaid tuition programs in Florida, Virginia, Washington, Ohio, South Carolina, Nevada, Alaska, West Virginia, Kentucky, Illinois, Colorado, and Wisconsin. He has performed stochastic asset/liability studies for Ohio, Virginia, Colorado, and Washington and designed an immunized fixed income strategy for Wisconsin.

Alan's experience covers prepaid tuition plans, retirement plans, and insurance organizations. He specializes in the analysis and management of financial risk. He performs asset/liability studies, including stochastic modeling and investment policy work. He is the Chair of Milliman's Capital Markets Committee and oversees the development of the firm's capital market assumptions.

PRESENTATIONS
Alan is a frequent speaker on prepaid tuition plan, pension, and investment topics, having addressed many groups, including:

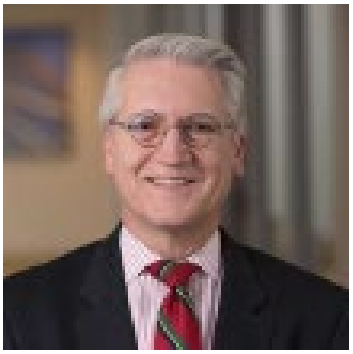
- College Savings Plan Network
- National Association of State Treasurers
- International Foundation of Employee Benefit Plans
- Government Finance Officers Association

PUBLICATIONS
Alan is co-author of the annual Milliman Pension Funding Study that analyzes the funding progress of the 100 largest U.S. corporate defined benefit plans. He also has authored papers on various actuarial topics of concern to Milliman's clients.
Selected biography:
▪ DB Plan Risk Management: Finding a Better Match Between Assets and Liabilities (Milliman *Benefits Perspectives*, 2007)
▪ Back to the Benefits Basics: DB or not DB – That is the Question (*Benefits Quarterly*, 2007)
▪ Taking Stock of Option Expensing (*Contingencies*, 2006)
AFFILIATIONS
Member of the Financial Analysts of Philadelphia

EDUCATION
▪ BBA, Economics, Wharton School, University of Pennsylvania
▪ MS, Actuarial Science, Temple University

PROFESSIONAL DESIGNATIONS
▪ Fellow, Society of Actuaries
▪ CFA Charterholder
▪ Member, American Academy of Actuaries

Glenn E. Ross
Managing Partner, Marquette Associates



Glenn E. Ross is a managing partner for Marquette Associates. An owner of the firm, Glenn joined the company in 2013 through the merger with Archstone Portfolio Solutions, which he co-founded in 2006. He serves as the primary investment consultant on several fo the firm's relationships.

Glenn has 41 years of experience in investing and consulting and is the co-author of *How to Select Investment Managers & Evaluate Performance: A Guide for Pension Funds, Endowments, Foudnations, and Trusts*, Wiley & Sons, 2008. Prior to forming Archstone Portfolio Solutions, Glenn was the senior vice president of institutional investment services and a quantitative portfolio manager for Mercantile Bankshares. He also served as the director of quantitative services for Brown Investment Advisory & Trust Company. Glenn earned his B.S. in fiance from Towson University and was the recepient of the College of Business and Economics Dean's Recognition Award as part of the Alumni of the Year Awards in 1998. He also holds an M.B.A. in finance from Loyola University Maryland.

Glenn is a member of the Maryland chapter of Healthcare Financial Management Association (HFMA). He formerly served as a board member of the Towson University College of Business and Economics, was a finance department advisory board member and an adjunct professor of finance since 1990. He is the founder and former chair of the Spending Affordability Commission for Harford County, Maryland – where he remains a member ad president emeritus of the Albert P. Close Foundation board of directors. Glenn is also a trustee and past treasurer of the Harford Day School and former board member of the Upper Chesapeake Health System Foundation. He is a member of the Society of Quantitative Analysts and an active volunteer at the Perry Point VA Medical Center in Maryland.

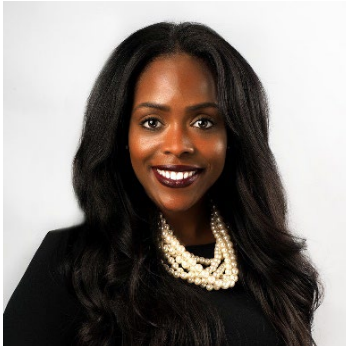
SESSION 3: The Neverending Story – Controlling the Message Year-After-Year

MODERATOR

Lael Oldmixon
Executive Director, Alaska 529
Lael joined Alaska 529 in 2013 as Executive Director. Oldmixon hails from New Hampshire and has lived in Alaska since 2007. In addition to 529 education savings, her professional experience includes admissions, residence life, and career services. She is passionate about financial literacy, behavioral finance, marketing, communications, and leadership development. Oldmixon holds a B.A. in American Studies from Saint Michael's College (2000) and a M.Ed. in Higher Education Administration and Student Affairs (HESA) from the University of Vermont (2005).

PANELISTS

Dr. Tya R. Mathis-Coleman
Deputy Treasurer, Nevada
Tya R. Mathis-Coleman currently; serves as the Deputy Treasurer overseeing the College Savings Division for the State Treasurer's Office. She is responsible for helping Nevadan's plan, save and pay for post-secondary education, she feels privileged to work for an organization with the same values as her own. Tya believes in the tremendous impact that a person can have on the lives of young people. She strives to make a difference in the lives of others daily.



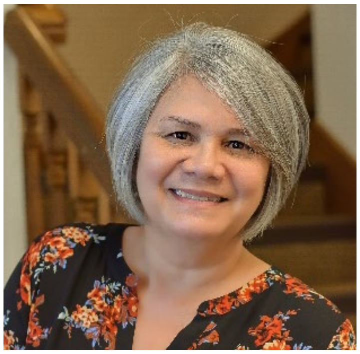
Mathis-Coleman is a passionate public servant of Southern Nevada who is committed to public education. She is a knowledgeable executive with extensive practical experience and knowledge of leadership and program development, inclusion & diversity, talent acquisition, strategic planning, employee relations, branding, and community engagement.

Tya is a native of Las Vegas, Nevada and is a proud product of the Clark County School District and the Nevada System of Higher Education. She received her bachelor's degree in Political Science from the University of Nevada, Reno (UNR) and her Master of Public Administration degree from the University of Nevada, Las Vegas (UNLV).

She volunteers with the Black Community Organization Network (BCON), Les Femmes Douze debutante program, the Junior League of Las Vegas with her sorority, Delta Sigma Theta Sorority, Inc.; and currently serves on the Board of Directors for CASA, Age-On and the UNLV Alumni Association.

Mathis-Colman was named "40 Under 40" by Vegas Inc. in 2017, Farwest Soror of the Year in 2019 and has received several awards for her commitment to public service. Her most rewarding experience comes from serving as a part time instructor at UNLV. She enjoys working with her undergraduate students each semester.

Mathis-Coleman loves spending time with family and friends in her free time. She is the eldest daughter of Raymond and Dr. Beverly Mathis. Tya is married to Dr. Sebern Coleman, Jr. and they have one daughter, the love of her life, Hunter Grace (age 3).



Jackie Ferrado
Community Relations Manager, WA529
Jackie Ferrado is the Community Relations Manager for the Washington 529 College Savings Plans (WA529). She has represented the college savings plans and the Washington Student Achievement Council (WSAC), for over 20 years presenting information, developing partnerships, and fostering community relationships to provide families with resources, information and education that support student success.

Jackie holds a Bachelor of Arts degree from the Evergreen State College, where she studied Communications and Management. She is also a 2015 graduate of the Leadership Thurston County, a program dedicated to developing informed, skilled and committed community leadership representative of the area's diverse citizens.

Heather Barthelmes
Marketing Manager, Michigan Education Trust
Heather Barthelmes serves as marketing manager for the Michigan Education Trust (MET), a 529 prepaid tuition savings program enabling customers to pay for future higher education at today's price.

Barthelmes leads MET's marketing and outreach team. She develops and implements a comprehensive engagement strategy to help team members make value-driven connections among current and prospective MET customers. She also manages MET's website, digital and social channels and outreach strategy and activities.

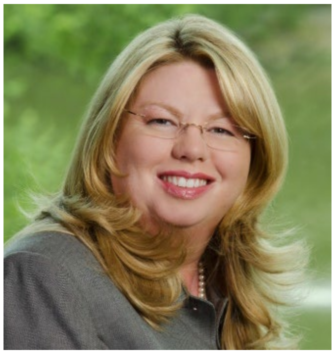
Barthelmes joined MET in 2015 as a digital marketing analyst. Previously, Barthelmes was an admissions representative with Davenport University, where she guided new students in navigating enrollment and financial aid processes.

She is a proud mother of a spunky eight-year-old son, Parker, and has been happily married to her husband Brian for more than 10 years.

Barthelmes holds a bachelor's degree in broadcast and cinematic arts from Central Michigan University, with minors in journalism and political science.

SESSION 4: Risky Business – Prepaid Operational Risk Management

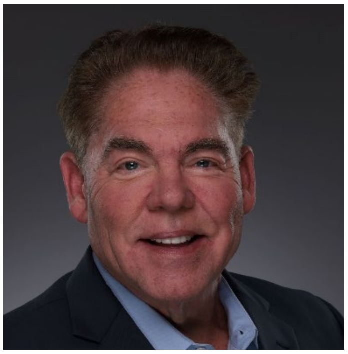
MODERATOR



Sherri Wyatt
Chief Compliance Officer, Virginia529
Sherri Wyatt is the Chief Compliance Officer at Virginia529. The largest 529 plan in the country, Virginia529 assists families in saving for their higher education and disability-related expenses through its two college savings programs (Invest529 and CollegeAmerica) and its disability savings program ABLEnow. Prior to joining Virginia529, she worked as the Financial Management Audit Director for the Virginia Auditor of Public Accounts. Sherri has a bachelor's degree in accounting and a master's degree in business administration from Virginia Commonwealth University. She resides in King & Queen County Virginia with her husband.

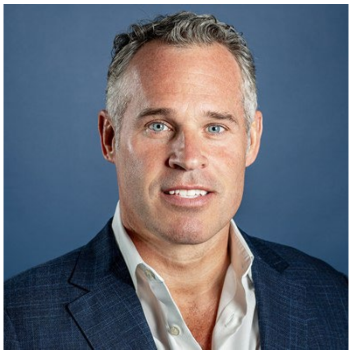
PANELISTS

Will Thompson
Deputy Executive Director, Florida Prepaid
As the Deputy Executive Director of the Florida Prepaid College Board, Will leads the policy and strategic framework for Florida's 529 college savings programs. For the past 17 years, he has helped Florida families save for, and utilize funds at, colleges and universities nationwide. Committed to the continuous enhancement of this mission, Will is the executive sponsor for the Board's Salesforce optimization initiative.



Richard Stierwalt
Executive Vice President of Regulatory & Compliance, Catalis
Richard has 25 years of experience in the financial services industry, with over a decade of experience in FinTech and financial services operations for some of the largest commercial banks in the U.S. Richard has a long history of creating innovative structures in companies allowing them to operate far more efficiently. Richard has founded two companies, raised capital, and taken them public as CEO. Within Catalis, he is responsible for the Regulatory & Compliance Vertical which includes the brands Intuition College Savings, Veritec Solutions, and On Point Technology. He will lead a team to develop and execute strategies to ensure Catalis continues to deliver exceptional 529 Plan products effectively and efficiently.

Jason Schlenker
Executive Vice President, Inktel Contact Center Solutions



Over the past 25 years, Jason Schlenker has learned what it takes to create great partnerships and has come to value the impact of developing solutions that truly impact and innovate their clients' businesses. After earning his Bachelor's degree at Florida International University, he discovered Inktel, an incredibly energetic company that put a premium on building great partnerships with its clients. 25 years later, Mr. Schlenker has worked in almost every department at Inktel and still looks forward to making and impact each day with clients, new partners and colleagues. Mr. Schlenker is primarily tasked with growing the company's revenues, identifying new industry verticals and services and helping shape policy and direction for the company as a member of the Executive Management Team.