

## 2024 CSPN COMMITTEES

**Executive Board** – Mary Morris (VA) Chair & Kimberly Yee (AZ) Vice-Chair  
Meets first Tuesday of each month at 1:00 pm ET

**Communications Committee** – Ben Gibbons (OH) & Michelle Winner (MD), Co-Chairs  
Facilitates external and media communications, nationally promotes 529 Day and College Savings Month, coordinates website revision, and oversees the 529 Campaign. Meets the fourth Thursday of each month at 2:00 pm ET

**Corporate Affiliate Advisory Board** – Kris Adrian, JP Morgan & Kerry Alexander, TIAA, Co-Chairs. Provides a forum for NAST corporate affiliates to participate in CSPN initiatives and committees. Meets as needed.

**Data, Operations & Technology Committee** – John Mitchell (IL) & Alyson Luszcz, T Rowe Price Co-Chairs. The committee monitors 529 plan operations, administration, and technology advancements for the purpose of making recommendations to the CSPN Executive Board. The committee is also responsible for the development and review of the data collection efforts of the Network and will work in conjunction with other committees as necessary.

**Diversity and Leadership Committee** – Khalel Pritchard, Ascensus & Robin Lott (MI) Co-Chairs. The committee is responsible for addressing diversity issues and institutionalizing inclusion across CSPN and its initiatives. The committee will provide recommendations to the Executive Board to define and to promote diversity and inclusion for purposes of working across CSPN to develop new avenues and opportunities for a wider number and variety of Members to assume leadership roles on the Executive Board, in committees, at conferences and in working groups. Meets on the third Wednesday at 2 pm ET.

**Federal Initiatives** – Leslie Crudele (VA) & Liz Fontaine, (MA) Co-Chairs. Identifies and prioritizes federal legislation and regulatory initiatives, and works closely with Williams & Jensen, NAST's national lobbying firm. Meets on the first Monday of each month at 3:00 pm ET.

**Governance Committee** – Andrea Feirstein, AKF Consulting Co-Chair. The Governance Committee will address responsibilities for accelerating key internal initiatives (along with providing new leadership opportunities), including the periodic review of the following organizational roles and responsibilities:

- (a) Executive Board eligibility
- (b) Officer roles and responsibilities
- (c) Committee leadership structure, roles, charters, membership, meeting schedules, quorums and voting protocols

- (d) Officer and Executive Board Member nominations processes
- (e) Diversity, equity and inclusion
- (f) CSPN leadership and committee succession planning, including advising upon vacancies in committee co-chair positions if asked to do so
- (g) Transparency of Network communications
- (h) Implementation and monitoring of Strategic Plan progress

**Legal & State Affairs Committee** – Mary Anne Busse, Great Disclosure & John Stevens, (PA) Co-Chairs. Reviews and monitors legal and state issues, and reviews disclosure principals and other legal documents. Meets the third Tuesday of each month at 2:00 pm ET.

**Member Engagement:** Kimberly Yee (AZ) & Teresa Stewart, American Century, Co-Chairs. Develops strategies to actively engage members, promotes value of CSPN members, and oversees development of the conference program for the annual Treasury Management Training Symposium. Meets on the first Wednesday of each month at 2:00 pm ET.

**Prepaid Tuition / Guaranteed Savings Plans** – Luke Minor (WA) & Karen Setzer (VA), Co-Chairs. Discusses issues unique to prepaid plans and develops annual prepaid conference program.

Much of the data sharing, business updates and planning of CSPN happens in our committees. Meetings are typically held once a month and last for an hour or less. Both state agency and corporate affiliate members are welcome to participate or listen in. Share your expertise with others, expand your knowledge in a new area, and help shape the future of 529. The meetings are also a great way to meet people to add to your professional network. You can participate in more than one — many of us do!

#### **Online Member Forum and Resource Library**

To access the CSPN member forums, go online at <https://member.nast.org/login.aspx> to create, update and maintain your member profile and participate in the CSPN Forum to learn more about what other 529 plans are doing to promote awareness and use of the plans. Additionally, the [Resource Library](#) includes committee summaries, governance materials and other network resources available to members. Check out these and other tools available to CPSN members.

Contact [Chris Hunter](#) for more information or to learn how you can join one of the committees.