COLLEGE SAVINGS PLANS NETWORK
A Network of the National Association of State Treasurers

COLLEGE SAVINGS PLANS NETWORK
2023 PREPAID MINI-CON VIRTUAL
April 10 – 11, 2024 | 1PM – 4PM ET
SPEAKER BIOS

SESSION 1: A Marriage of the Marketing Minds: Spotlight on Prepaid Marketing

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

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 nine-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.

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 18 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.

Claire Whittington
VP of Client Success, Catalis

Claire is Vice President of Client Success for Catalis Regulatory and Compliance, LLC and has over fifteen years in the 529 industry. Claire joined Catalis as a Client Success Manager in November 2015. Claire leads a team of Client Success Managers that oversee all client management, end-to-end service and product delivery.

Claire previously served as Executive Director of College Savings Mississippi, overseeing the Mississippi Prepaid Affordable College Tuition and Mississippi Affordable College Savings Plans. During her tenure with the Office of the State Treasurer, she spearheaded the restructuring and re-opening of the MPACT plan. Claire also served as the director of Communications and Special Programs for the Mississippi Department of Finance and Administration, Office of Insurance, prior to joining Catalis in 2015.

Claire is a Mississippi native and holds a B.S. in Psychology from Mississippi College (2005). Claire loves to travel with her three-year-old, Price, and Jay, her husband of seventeen years.

SESSION 2: Well-funded Plans: Where Do We Go From Here?

MODERATOR

Andrea Feirstein
Managing Director, AKF Consulting Group
Andrea Feirstein, Managing Director, AKF Consulting Group, founded the firm in 2002 to address the growing need in the college savings marketplace for unbiased, expert advice on all aspects of 529 plan design and administration. Since then, she has expanded the firm's focus to include ABLE plans as well as Secure Choice plans. Today, AKF Consulting advises 529 Program Administrators in 15 States, including seven currently open Prepaid Plans. Prior to starting AKF Consulting Group, Ms. Feirstein was Director of College Savings at Citigroup Asset Management (now Legg Mason), where her team developed and managed the firm's proprietary 529 business, including the 529 Plans in Illinois and Colorado.

An active industry participant, Ms. Feirstein currently serves on the Board of the National Institute of Public Finance, a joint venture between the Foundation of the National Association of State Treasurers ("NAST") and Pepperdine University. She previously chaired the NAST Corporate Affiliate Advisory Board and the Corporate Affiliate Committee of the College Savings Plans Network ("CSPN"). She also chairs the Governance Committees of CSPN and the ABLE Savings Plan Network. Feirstein is a member of the MSRB Advisory Group on Municipal Fund Securities.

Ms. Feirstein graduated from the University of Virginia School of Law, where she served as Editor-in-Chief of the Virginia Tax Review, and from the Georgetown University School of Foreign Service (BS in International Finance). She is an SEC- and MSRB-registered Municipal Advisor Principal (Series 54) and a Municipal Advisor Representative (Series 50). She is also a member of the New York Bar (retired).

PANELISTS

Matt Larrabee, FSA, EA, MAAA
Principal & Consulting Actuary, Milliman, Inc.
Matt Larrabee is a principal and consulting actuary in Milliman's Portland, Oregon office. He worked for Milliman from 1998 to 2001, and rejoined in 2012 after having served as Portland retirement practice leader of a national competitor for six years.

Professional Work Experience
Matt has more than 25 years of actuarial consulting experience. His expertise is in pension and retiree medical programs sponsored by governmental entities. Matt has consulted with a variety of plan types and sponsors, and is currently the lead actuary for two of the country's largest 20 pension plans (Florida Retirement System, Oregon Public Employees Retirement System).

Matt assists clients with a variety of matters. His projects and experience include:

- Board and legislative public testimony
- Legislative concept cost analyses
- Stochastic analysis of funding policy alternatives
- Asset/liability analysis
- Stakeholder communications and media interaction
- Experience studies
- GASB financial reporting
- Expert witness testimony
- Design assistance on a new plan
- Actuarial audits of large, complex systems
- Stochastic assessment of long-term tax levy adequacy for system funding

Professional Designations

- Fellow, Society of Actuaries
- Member, American Academy of Actuaries
- Enrolled Actuary under ERISA

Education

- BS, Mathematics, University of Utah
- BSEE, Electrical Engineering, University of Utah

Affiliations

- Past Member, American Academy of Actuaries Public Plans Committee
- Past Chair, Milliman's Public Sector Specialty Practice Group

Publications and Presentations

Matt has been quoted numerous times by the media on public pension issues. He is an experienced public speaker, including having the honor of speaking at the annual conferences of the National Association of State Retirement Administrators (NASRA), the National Council on Teacher Retirement (NCTR), the Association of Public Pension Fund Auditors (APPFA), and the Institutional Society of Risk Professionals (ISRP). Matt also conducted webinars for the National Institute on Retirement Security (NIRS), and has made presentations to regional GFOA conferences.

Matt is the co-author (with Jennifer Brown of the National Institute on Retirement Security) of the 2017 research study, Decisions, Decisions–Retirement Plan Choices for Public Employees and Employers.

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 $2 billion of their WA529 savings to attend colleges in all 50 states and at least 15 foreign countries.

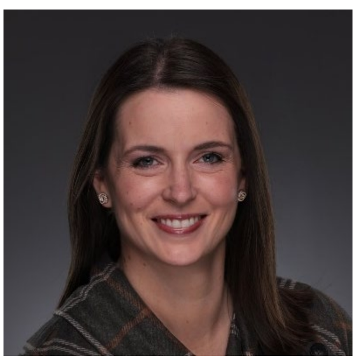
Luke holds a MA in Public Administration from The Evergreen State College and a BA in Business Administration from Western Washington University. When he's not focused on helping other families save for future higher education expenses, Luke thinks a lot about saving and planning for his own daughter's 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.

Luis Sierra, CFA
Vice President, Marquette Associates

Luis Sierra is a vice president with 13 years of investment experience and works from Marquette's Baltimore office. He joined the firm in 2017 and is a member of the diversity, equity, and inclusion committee, sustainable investing group, and nonprofit services group. Luis serves as the investment consultant on several client relationships with a focus on public funds and nonprofit clients.

Prior to joining Marquette, Luis worked as an investment counselor at Fisher Investments. Previously, he worked as an operations administrator at Efficient Advisors.

Luis holds a B.S. in finance and international business from Drexel University and an M.B.A. in international business and an M.S. in finance from Temple University's Fox School of Business. Luis is a CFA® charterholder and a member of the CFA Institute and the CFA Society of Baltimore. He serves as treasurer and board member of JANE (Jewels Advancing, Nurturing, and Empowering), Inc.



Claire Whittington
VP of Client Success, Catalis

Claire is Vice President of Client Success for Catalis Regulatory and Compliance, LLC and has over fifteen years in the 529 industry. Claire joined Catalis as a Client Success Manager in November 2015. Claire leads a team of Client Success Managers that oversee all client management, end-to-end service and product delivery.

Claire previously served as Executive Director of College Savings Mississippi, overseeing the Mississippi Prepaid Affordable College Tuition and Mississippi Affordable College Savings Plans. During her tenure with the Office of the State Treasurer, she spearheaded the restructuring and re-opening of the MPACT plan. Claire also served as the director of Communications and Special Programs for the Mississippi Department of Finance and Administration, Office of Insurance, prior to joining Catalis in 2015.

Claire is a Mississippi native and holds a B.S. in Psychology from Mississippi College (2005). Claire loves to travel with her three-year-old, Price, and Jay, her husband of seventeen years.

SESSION 3: Let the Good Times Roll: Rolling out the new Roth IRA Rollover provisions

MODERATOR

Mary Anne Busse
Managing Director, Great Disclosure LLC

Mary Anne Busse is Managing Director and founder of Great Disclosure LLC. She provides guidance to State Plan administrators on 529 College Savings Plan and ABLE Plan administration and design, governance, RFP formation and evaluation, marketing, operations, securities disclosure, communications and investor relations. She also advises public companies on disclosure and governance issues. She consistently receives excellent ratings from clients for her knowledge of issues and developments across disciplines and the practical insight she provides from her extensive experience in dealing with the SEC, MSRB, Department of the Treasury, and program administration matters.

Ms. Busse began her career in 1987 serving in the Division of Corporation Finance at the Securities and Exchange Commission in Washington, D.C. She then practiced in New York and Baltimore, undertaking a variety of complex public and private securities offerings and major mergers and acquisitions for multinational and Fortune 500 companies. Before forming Great Disclosure LLC in 2005, she served for five years as an Assistant Attorney General for the State of Maryland, as legal counsel to the College Savings Plans of Maryland. She has been advising state government 529 and ABLE Plan administrators since 2000.

She speaks regularly to interested audiences on the topics of securities, disclosure, investor relations, communications and governance, receiving high marks for her ability to effectively deliver complex concepts in a clear, concise, and understandable manner.

She is an active member of the College Savings Plans Network, is Co-Chair of its Legal and State Affairs Committee, and serves on its Communications Committee, Blog Subcommittee, Conference Planning Committees and several other subcommittees. She also serves on the National Association of State Treasurers ABLE Committee. Mary Anne has received several national awards for outstanding achievement in support of the college savings and ABLE missions, receiving the NAST Corporate Affiliate of the Year Award in 2020.

In 2020, Ms. Busse was elected to the NAST Corporate Affiliate Advisory Board and serves as it's representative to the NAST ABLE Committee. In addition, she is currently serving her fourth term on the Municipal Securities Rulemaking Board's Municipal Fund Securities Advisory Group.

Ms. Busse holds a B.S. in Mathematics from the University of Detroit and a J.D. from The George Washington University. She is a registered Municipal Advisor Representative and Municipal Advisor Principal.

PANELISTS

Carolyn Bishop
Chief Operations Officer, Virginia529

Carolyn serves Virginia529 as the Chief Operations Officer. In her role, she is responsible for providing leadership for Technology, Finance, and Administration.

Bishop joined the team in February 2019, coming from her position as Operations Director of the System and Agency Services division of the Federal Reserve Bank of Richmond, where she managed operations for five critical payments applications for the Federal Reserve System. Also at the Federal Reserve Bank, she served as the Director of Finance and Administrative Services for Business and Technology Solutions. Previously, Bishop was the County Administrator for Powhatan County, Virginia. She also has leadership experience with investments and derivatives analysis.

Bishop received her Bachelor of Arts in Political Science and Masters in Public Administration, both from Virginia Commonwealth University. She also possesses certificates in Business Management from William and Mary, Nonprofit Management from the University of Richmond, and numerous technology certifications. In addition, Bishop serves as the Vice Chairman of the Virginia Board for Public Building Authority.

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.

John J. Stevens, Esquire
Director of the Bureau of Savings Programs
Over fifteen years of experience overseeing all aspects of the Pennsylvania Treasury Department's savings programs including the Pennsylvania 529 College and Career Savings Program and the Pennsylvania ABLE Program, including:

- Administration of the Program's external record-keeper and investment manager
- Management of the Bureau's internal operations.
- Ensuring compliance with applicable federal and state laws and regulations

J.D. from Boston University School of Law