

CSPN Virtual Prepaid Mini-Con Agenda

Day 1 – Wednesday, April 10, 2024

1:00 p.m. – 4:00 p.m. (ET)

1:00 p.m. – 1:20 p.m.	Welcome and Overview <i>CSPN Chair Welcome: Mary Morris, Virginia529</i> <i>Event Hosts: Karen Principe, Virginia529 and Luke Minor, WA529</i> <ul style="list-style-type: none">• Introductions• Prepaid snapshot (industry data, quick primer on various types of prepaids)
1:20 p.m. – 1:25 p.m.	Break
1:25 p.m. – 2:40 p.m.	A Marriage of the Marketing Minds: Spotlight on Prepaid Marketing (PANEL DISCUSSION) <i>Moderator:</i> Lael Oldmixon, Alaska 529 <i>Panelists:</i> Heather Barthelmes, Michigan Department of Treasury Will Thompson, Florida Prepaid Claire Whittington, Catalis On her wedding day, they say a bride should be equipped with something old, something new, something borrowed, and something blue. A little known fact is that this also applies to marketing professionals. In this session, our panel of experts will discuss and explore various marketing initiatives to meet potential savers where they're at in an ever-evolving world and higher education landscape. Initiatives range from continuing tried and true tactics, implementing new and innovative strategies, leveraging ideas gleaned from successes in other states, and learning when enough is enough when trying certain initiatives over and over again until their blue in the face.
2:40 p.m. – 2:50 p.m.	Break
2:50 p.m. – 4:00 p.m.	Well-funded Plans: Where Do We Go From Here? <i>Moderator:</i> Andrea Feirstein, AKF Consulting <i>Panelists:</i> Matt Larrabee, Milliman Luke Minor, WA529 Luis Sierra, Marquette Claire Whittington, Catalis Most Prepaid Plans are in the enviable position today of being overfunded in comparison to our future participant obligations. This session will look at how we arrived in this position by reviewing the forces that led us to this overfunding. Should something in our fundamentals change (e.g. unit price, underlying actuarial assumptions, asset allocation of our investments)? Then, we have to ask what do we do with the surpluses? And finally, do we change Plan elements going forward?
4:00 p.m. – 5:00 p.m.	BONUS Session: Networking Join us immediately following the day's planned sessions to catch up with your colleagues in this informal networking session.

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Day 2

Thursday, April 11, 2024

1:00 p.m. – 4:00 p.m. (ET)

1:00 p.m.	Welcome – Karen Principe, Virginia529 and Luke Minor, WA529 <ul style="list-style-type: none">Recap of Day 1
1:15 p.m. – 2:30 p.m.	Let the Good Times Roll: Rolling out the new Roth IRA Rollover provisions (PANEL DISCUSSION) Moderator: Mary Anne Busse, Great Disclosure Panelists: Carolyn Bishop, Virginia529 Linda Fernandez, Texas John Stevens, PA529 The Roth IRA Rollover option is new to the 529 industry. This session will look at how programs have implemented this new option, and some of the specific considerations and challenges presented specific to rolling prepaid plans.
2:30 p.m. – 2:40 p.m.	Break
2:40 p.m. – 3:50 p.m.	State of the States: Prepaid Style <i>Facilitators:</i> Karen Principe, Virginia529 and Luke Minor, WA529 <i>Presenters:</i> Y'all Confirmed states: Chad Wright (AL) Lael Oldmixon (AK) Will Thompson (FL) David Lawhorn (KY) Claudia Niles (MA) Megan Patino (MI) Tya Mathis-Coleman (NV) Heather Birnie (PA) Joanne Dashiell (PC529/CollegeWell) Linda Fernandez (TX) Karen Principe (VA) Rodger O'Connor (WA) We know this is what you all have been waiting for – hearing the latest and greatest ideas from your colleagues that you can shamelessly borrow and repurpose for your own state's plan! This session will showcase each state's latest innovations and successes with their prepaid programs.
3:50 p.m. – 4:00 p.m.	Close Out and Recap