



CSF529

Education Savings for a Lifetime

20 ANNUAL 27 CONFERENCE

APRIL 13-15

Funding the Future with 529s: Investing in the Next Act

INDIAN WELLS, CA

TOMMY BAHAMA MIRAMONTE RESORT & SPA

SPONSORSHIP OPPORTUNITIES

OVERVIEW

The College Savings Foundation (CSF) is having its annual conference at the Tommy Bahama Miramonte Resort & Spa in Indian Wells, CA from April 13-15, 2027. CSF consists of investment managers, state officials, state program managers, law firms, accounting and consulting firms and non-profit agencies that participate in the sponsorship or administration of 529 college savings plans.

Sponsors of the conference will benefit from the opportunity to interact with leaders in the education savings industry.

For any non-member sponsor who decides to join CSF within 60 days of the conference, the first year's dues will be reduced by the registration fees paid for up to two attendees of the 2027 Annual Conference.

Topics Covered

A variety of timely topics will be discussed in detail during general sessions, including:

- Artificial Intelligence
- Data Trends
- Federal Legislative and Regulatory Updates
- Marketing
- Trump Accounts
- 529s in the Workplace

Attendees

This is a unique opportunity to network with and introduce your products and services to financial services and other key professionals involved in the 529 education savings plan industry including: Representatives of program managers and investment managers; State Treasurers and staff; state sponsors and program officers; senior managers at broker-dealer firms including marketing and product managers and operational professionals involved in the development, support and servicing of these programs; legal and compliance professionals, accountants; higher education professionals; representatives of not-for-profits; financial advisors and planners and other interested parties.

ABOUT US

College Savings Foundation (CSF) is a Washington, D.C. based not-for-profit organization with the mission of helping American families achieve their education savings goals by working with public policy makers, media representatives and financial services industry executives in support of education savings programs.

CSF serves the education savings industry as a central repository of information and an expert resource for its members and for representatives of state and federal government, institutions of higher education, and other related organizations and associations.

CSF's education savings mission serves families and individuals of all income levels and ethnic backgrounds across the nation. CSF supports the broad availability of, and participation in, 529 Plans, and encourages states to consider treating participation in all 529 Plans equally when considering legislation establishing any type of state benefits to 529 Plan participants. A competitive environment in which 529 Plan selection is based on the merits of each 529 Plan, the investor's prior investment experience, college savings time horizon, and risk

tolerance and not on state tax or other benefits, will result in more successful savers and ultimately make college more affordable and accessible to more families.

Why become a sponsor?

CSF is committed to creating meaningful opportunities for our sponsors to increase awareness and access to the CSF Membership:

- To gain exposure through educational and networking sessions
- To reach attendees through the mobile conference app
- To make personal connections
- To support the 529 community

2024-2026 CSF OFFICERS

Chair: Chris McGee

Vice Chair: Sandie Palmer

Secretary: Tracy Zeigler

Treasurer: John Park

Past Chair: Vivian Tsai

CSF MEMBERSHIP

Firm	Membership
Ascensus	Board Member
Bank of America/Merrill	Board Member
BlackRock	Board Member
Capital Group Companies	Board Member
College Savings Bank, a Division of NexBank	Board Member
Commonwealth Savers Plan	Board Member
Fidelity Investments	Board Member
Franklin Templeton	Board Member
Invesco	Board Member
John Hancock Financial Services	Board Member
JP Morgan	Board Member
T. Rowe Price	Board Member
TIAA	Board Member
Vestwell	Board Member
Voya Investment Management	Board Member

Firm	Membership
BNY Mellon	Sustaining Member
Catalis	Sustaining Member
Dimensional Fund Advisors	Sustaining Member
New York Life Stable Value	Sustaining Member
NonProfitly	Sustaining Member
AKF Consulting	Associate Member
Backer/Saving For College	Associate Member
Chapleau Law Group	Associate Member
College Foundation, Inc.	Associate Member
College Investor	Associate Member
CollegeInvest	Associate Member
Education Trust of Alaska	Associate Member
GiftofCollege	Associate Member
Givebacks, Inc.	Associate Member
IDEal - Idaho College Savings Program	Associate Member
Indiana Education Savings Authority	Associate Member
Invite Education	Associate Member
ISS Market Intelligence	Associate Member
Kansas State Treasurer	Associate Member

Firm	Membership
Massachusetts Educational Financing Authority	Associate Member
Michigan Education Trust	Associate Member
my529	Associate Member
Nebraska College Savings Plan	Associate Member
Nevada Treasury – College Savings Division	Associate Member
New York 529 Program	Associate Member
Ohio Tuition Trust Authority	Associate Member
Pennsylvania Bureau of Savings Programs	Associate Member
Private College 529	Associate Member
ScholarShare Investment Board	Associate Member
Sootchy, Inc.	Associate Member
Spectra Professional Services	Associate Member
The Education Trust Board of New Mexico	Associate Member
Vanguard	Associate Member
Washington College Savings Plans	Associate Member
Wisconsin DFI	Associate Member

2026 ANNUAL CONFERENCE

(March 3-5 • Fort Myers, FL)

163 
Attendees

10 
Sessions

5 
Networking Events

25 
Sponsors



SPONSORSHIP LEVELS

BENEFITS	PLATINUM (\$10,000)	GOLD (\$5,000)	SILVER (\$2,500)	BRONZE (\$1,750)	PARTNER (\$1,000)
Complimentary Registration(s)	2	1	One (1) half-priced registration	One (1) half-priced registration	-
Logo on Conference Section of CSF Website and Promotional Emails	Prominent Position	Prominent Position	✓	✓	✓
Logo on Rolling PowerPoint between Sessions and Conference Signage	✓	✓	✓	✓	✓
Listing in Conference App within Respective Tier and Ability to Link Documents	✓	✓	✓	✓	✓
Take-One Table Item (sponsor responsible for production and shipping costs)	✓	✓	✓	✓	✓
Recognition During Welcome	✓	✓	✓	✓	✓
Attendee List	✓	✓	✓	✓	✓
Social Media Posts	Group logo recognition and tag on CSF's social sites before and after conference (Facebook, X, LinkedIn, Instagram) Example: CSF gratefully acknowledges 2027 Annual Conference Platinum Sponsors.	Individual logo recognition and tag on CSF's social sites before and after conference (Facebook, X, LinkedIn, Instagram) Example: CSF gratefully acknowledges 2027 Annual Conference Gold Sponsors.	Group logo recognition and tag on CSF's social sites before and after conference (Facebook, X, LinkedIn, Instagram) Example: CSF gratefully acknowledges 2027 Annual Conference Silver Sponsors.	Group logo recognition on CSF's social sites before and after conference w/other Bronze Sponsors: Facebook, X, LinkedIn, Instagram Example: CSF gratefully acknowledges 2027 Annual Conference Bronze Sponsors.	Group logo recognition on CSF's social sites before and after conference w/other partner sponsors: Facebook, X, LinkedIn, Instagram Example: CSF gratefully acknowledges 2027 Annual Conference Partner Sponsors.

SPONSORSHIP LEVELS *(Continued)*

BENEFITS	PLATINUM (\$10,000)	GOLD (\$5,000)	SILVER (\$2,500)	BRONZE (\$1,500)	PARTNER (\$750)
Event Sponsorship Includes PowerPoint slide or signage in event room.	Choice of one (1) co-sponsored event opportunity (limited to two sponsors for each event first come, first served). Includes recognition in conference app. Tuesday, April 13 • Opening Reception Wednesday, April 14 • Luncheon • Evening Reception	Choice of one (1) event/ item from following options, exclusive opportunity, (first come, first served): Wednesday, April 14 • Breakfast • All day beverage service • Morning Break • Afternoon Break Thursday, April 15 • Breakfast • Morning Break • To Go Lunches	Choice of conference app sponsorship or one (1) optional activity which may be offered throughout the conference, including (others TBD): Wednesday, April 14 • Early Morning Outdoor Yoga Thursday, April 15 • Early Morning Outdoor Yoga		
Promotional Item	Choice of one (1) item among the following (exclusive, first come, first served): • Key card envelope • Lanyard for name badges • Wi-Fi • Conference app • Notebook • Other items based on sponsor request				



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CONTACT US

For Sponsorship Opportunities

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Questions?

info@collegesavingsfoundation.org

We want to hear from you!

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 CSF (College Savings Foundation)

 @CSF529

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