

TUITION ACCOUNT PROGRAM
ADVISORY BOARD MEETING

November 19, 2024, 1:00 p.m.

AGENDA

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- Call to Order Mr. Stevens
- Welcoming Remarks..... Treasurer Garrity
- Tab 1. Administrative Matters Mr. Stevens
- Tab 2. 2024 Morningstar Rating Ms. Peachey
- Tab 3. PA 529 2023-2024 Annual Report Mr. Stevens
- Tab 4. Keystone Scholars 2023-2024 Annual ReportMs. McDermott
- Tab 5. PA 529 GSP Actuarial Report as of September 30, 2024 Mr. Stevens
- Tab 6. PA 529 GSP Investment Performance Report.....Mr. Martin
- Tab 7. PA 529 IP Investment Performance Report Ms. Ward
- Tab 8. PA 529 GSP and IP Audits..... Mr. Palmer
- Tab 9. Program Results Mr. Stevens
- Tab 10. Marketing and Outreach Report..... Ms. Holbert
Mr. Dominick
- Tab 11. Related Issues and Updates..... Mr. Stevens

Other Business

Adjournment

Tentative meeting dates for 2025: The meetings will begin at 1:00 p.m.

February 19

May 21

August 20

November 19