

TUITION ACCOUNT PROGRAM
ADVISORY BOARD MEETING

November 19, 2025, 1:00 p.m.

AGENDA

- Call to Order Mr. Stevens
- Welcoming Remarks..... Treasurer Garrity
- Tab 1. Administrative Matters Mr. Stevens
- Tab 2. 2025 Morningstar Rating Ms. Peachey
- Tab 3. PA 529 2024-2025 Annual Report Mr. Stevens
- Tab 4. Keystone Scholars 2024-2025 Annual ReportMs. McDermott
- Tab 5. PA 529 GSP Actuarial Report as of September 30, 2025 Mr. Stevens
- Tab 6. PA 529 GSP Investment Performance Report.....Mr. Martin
- Tab 7. PA 529 IP Investment Performance Report Ms. White
- Tab 8. PA 529 GSP and IP Audits..... Mr. Bonifanti
- Tab 9. Program Results Ms. Birnie
- 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 2026: The meetings will begin at 1:00 p.m.

February 18

May 20

August 19

November 18