

Introductions

Stefanie Croix

Moderator

- *Director of Business Services, CSBO,*
- *Lockport Township High School District 205*



Jennifer Proise, MBA, CFP, CRES

Speaker

- *Financial Advisor*
- *The Voyager Group, Ltd.*



Nathan Glassey, TGPC, QKA, CRES

Speaker

- *NTSA Executive Director, ARA*



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The State of Retirement Legislation in Illinois



- Who is the NTSA?
- What do they do?
- Why would a School Business Official need to know about the NTSA?

- Who is The Voyager Group, Ltd?
- What do they do?

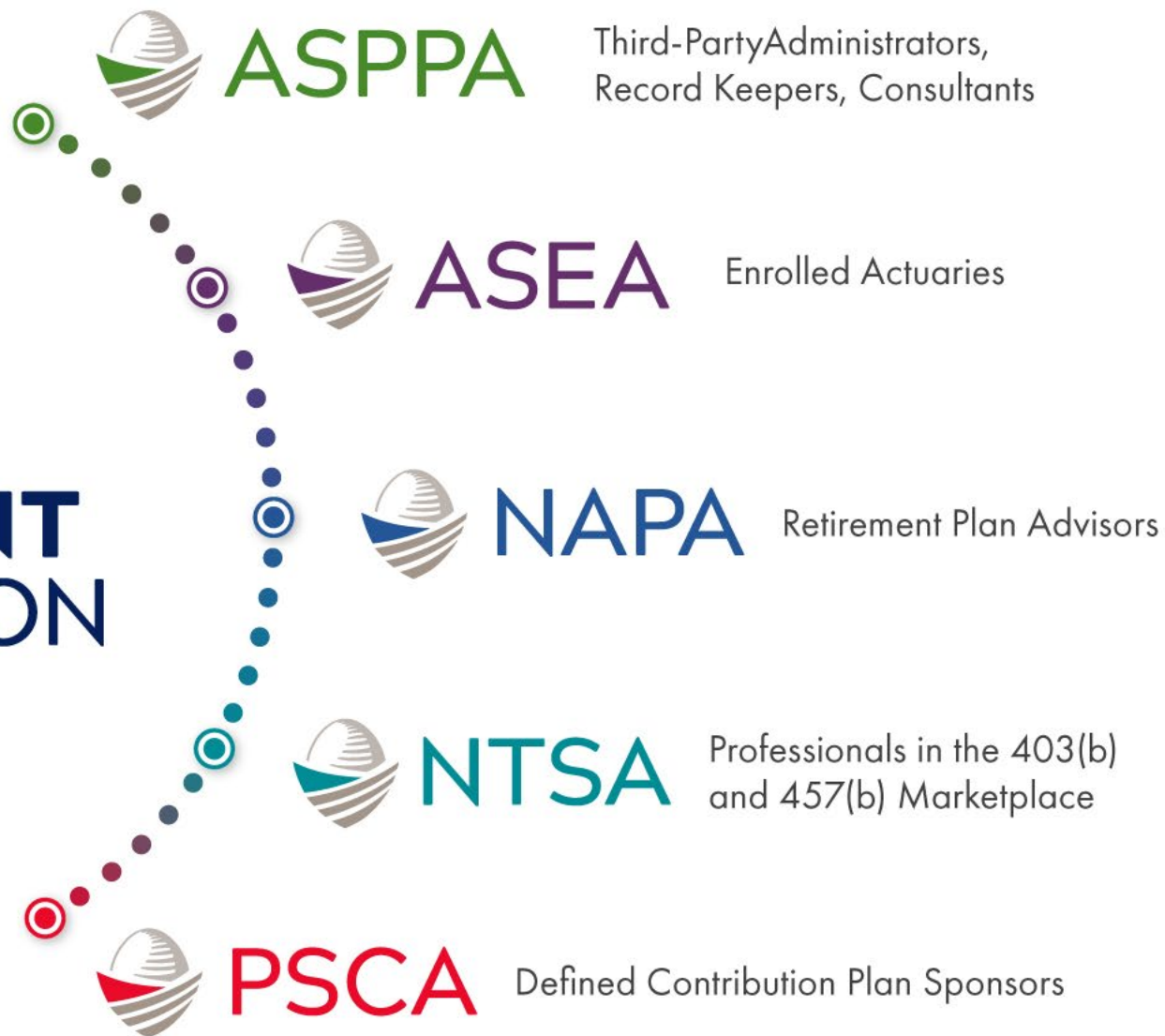


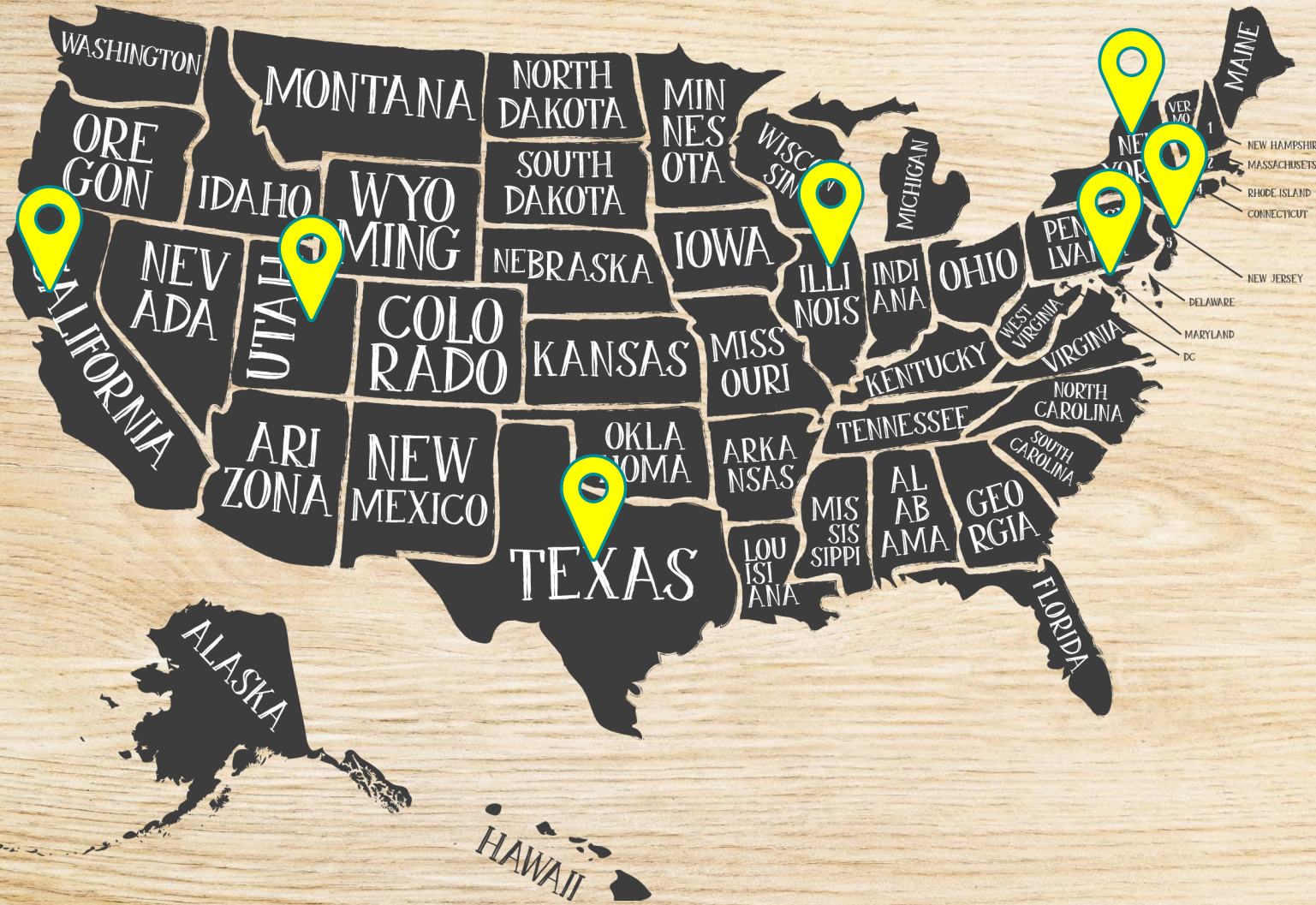
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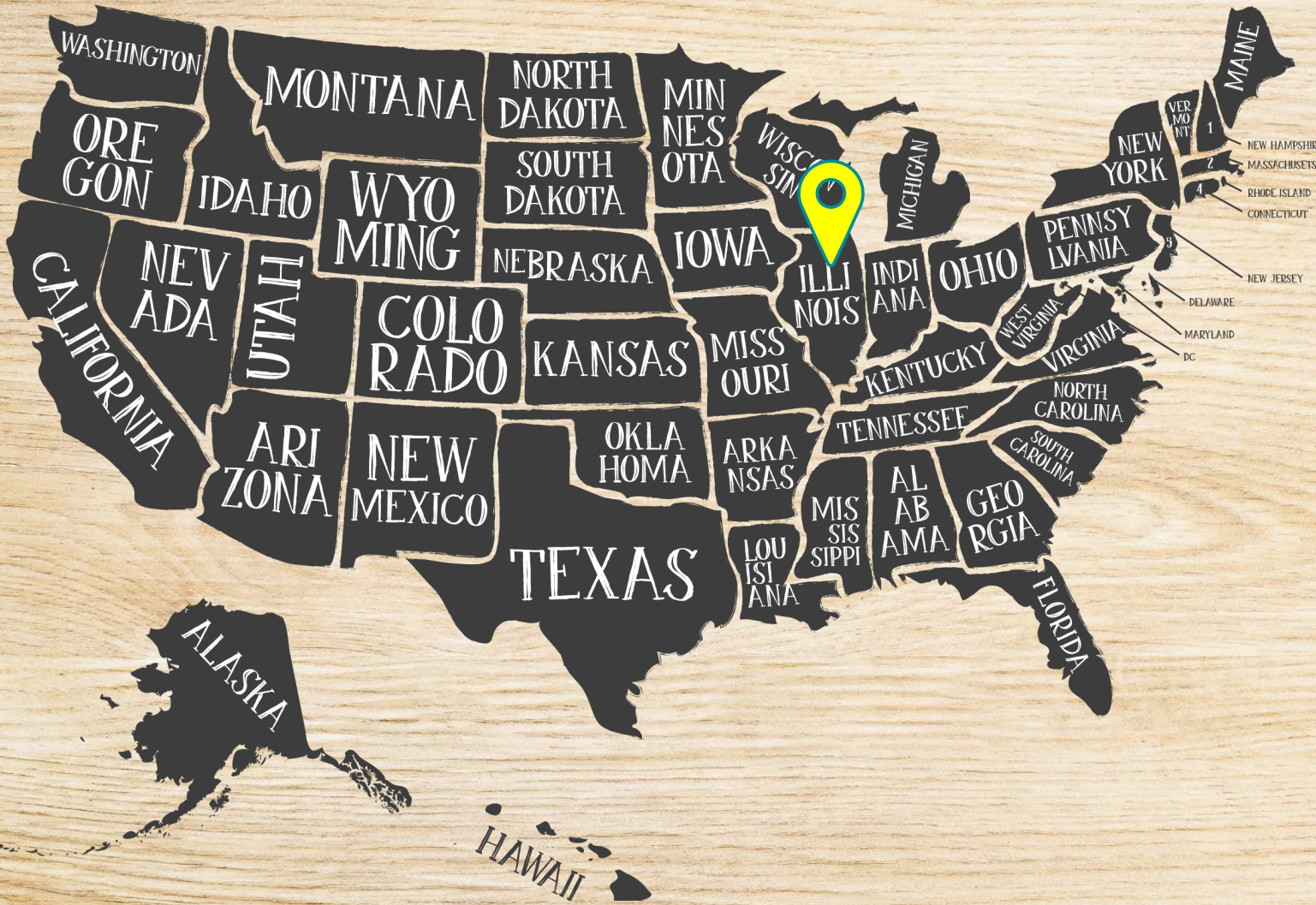


AMERICAN RETIREMENT ASSOCIATION





- 2023 Numbers
- 2,688 Bills Reviewed
- 398 Active Bills
- 142 Prioritized Bills
- 160 Enacted Bills



- 11 Prioritized Bills
 - 3 Coverage Bills
 - 5 Auto Enroll Bills
 - 1 4+1 Bill
 - 1 Tier 3 Bill
 - 1 State DC Bill

- Players
 - Michael Cassidy
 - Senator Martwick
 - Senator Halpin
 - Rep Kifowit
 - IASBO
 - IEA
 - IFT

What are we trying to solve?

- Legislative misunderstanding
- Plan confusion
- “Low” participation rates
- Educator financial education
- Educator access to an Advisor;
Student Loan Forgiveness
- Educator choice



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How can we solve it?

- Real world examples: Arizona, Connecticut, Maryland
- Stronger industry standards
- CRES

The logo for NTSA CRES is centered within a dark blue rectangular area. It consists of the text "NTSA CRES" in a bold, sans-serif font, with "NTSA" in white and "CRES" in yellow. A registered trademark symbol (®) is located to the upper right of "CRES". The text is enclosed in a white rectangular border, which is itself inside a larger white rectangular border, all set against the dark blue background.

NTSA CRES®

2023 ANNUAL
CONFERENCE

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A modern office interior featuring a wooden table, black chairs, and a laptop. The scene is brightly lit, with a staircase visible in the background. A dark semi-transparent rectangle is overlaid on the center of the image, containing the text "CRES Standards".

CRES Standards

A decorative horizontal bar at the bottom of the image, consisting of a series of blue and green chevrons pointing to the right.

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CRES Standards

In addition to the ARA Code of Conduct, advisors who earn the CRES designation must also abide by the following conduct and ethical standards:

- 1 Solicitation Agreement
- 2 Client Best Interest & Disclosure
- 3 NTSA Presentation Standard



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CRES Standards

1 Solicitation Agreement

Members agree to any and all individual and district school policies, rules, and restrictions as well as the adopting member's solicitation agreements.



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CRES Standards



2 Client Best Interest & Disclosure

Members will provide full and fair disclosures, act in the utmost good faith, determine suitability, not misrepresent themselves and act in the best interest of the client.

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CRES Standards

3 NTSA Presentation Standard

Members will act in good faith with other members and will conduct themselves with vendor neutrality based on educational not sales standards while administering NTSA provided communications and presentations.



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Questions and Answers

We thank you for your time!



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Presenters:

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