



**NCAAG**  
National College  
Affordability Group

### Dollars & Degrees

Join NCAAG as we welcome expert, engaging speakers on topics of affordability

**Monday, May 13, 2024**  
**Start Time** : 7:30 am PT/10:30 am ET  
**End Time** : approx. 3:00/6:00 pm

**Tuesday, May 23**  
**Start Time** : 7:30 am PT/10:30 am ET  
**End Time** : approx. 3:00/6:00 pm

**Conference Highlights**

- Nationally Ranked Speakers
- College Finances | AI | Marketing
- Roundtable Discussions
- Quick Content Topics

#### Why NCAAG?

Let's be honest, it is impossible for one person to have all the answers for today's complex college admissions process. But families want us to know every aspect of college admissions and college costs. When your families need experts on so many topics we can help with the answers.

#### This is the NCAAG difference;

Professionals representing every area of the college process admission counselors, accountants, IECs, financial planners, tutors, FAFSA experts, and more Professionals willing to share business ideas, marketing systems, and decades of experience.

#### WANT TO JOIN? ARE YOU-

A person interested in helping more families make a financially educated college choice?

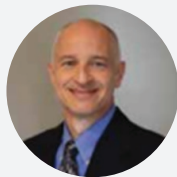
Someone who wants to collaborate with other likeminded professionals?

Want an experienced network where you can find the answers you need?

NCAAG is a welcoming, sharing membership organization supporting professionals on their quest to provide the best information to families.

For questions about NCAAG, the conference or assistance joining NCAAG please contact **Liane Crane** - liane@ncagonline.org

## Dollars & Degrees Monday May 13th Expert Speakers



### **Brad Barnett,**

MS, AFC®, CPFM, FAAC®  
Associate Vice President for  
Access and Enrollment Management/  
Financial Aid Director, James Madison U  
Past NASFAA National Chair

*Brad Barnett is an Accredited Financial Counselor, Certified Personal Financial Manager, and Certified Financial Aid Administrator who works as the Associate Vice President for Access and Enrollment Management/Director of Financial Aid & Scholarships at James Madison University. Closing in on three decades of experience in the financial aid profession, Brad has been active in state, regional, and national financial aid associations as a presenter, committee member/chair, and elected officer.*



### **Al Dickens, III**

Strategic Planning Group  
Senior Partner & Director of  
Leap Training®

*Al is a Senior Partner and Senior National Trainer for Leap® Systems, LLC. Al is a 30-year veteran of the insurance and financial services industry and has been a Leap Professional since 1994. Al is also served in agency leadership roles and his industry experience includes being an agent, agency trainer, sales manager and general agent. He has been a Leap National Trainer and consultant for more than a decade. Al and his wife, Elizabeth have been married for 31 years. They had two weddings in 2016 and now their daughter and son and their spouses live and work in Charlotte, NC. Al enjoys travel with his wife and playing golf.*



### **Dr. Robert J. Massa**

Principal and Co-founder  
Enrollment Intelligence Now  
Prior chief enrollment officer at  
Johns Hopkins University,  
Dickinson College and Drew University

*Dr. Robert Massa has been an enrollment professional in higher education since 1974. He served as the chief enrollment officer at Johns Hopkins University, Dickinson College and Drew University and as the first VP for marketing and communications at Lafayette College, his son's alma mater. He retired from full-time campus-based work in May, 2019. Bob taught in the University of Southern California's Enrollment Management and Policy masters program, has authored chapters in six books, and is a frequent contributor to Inside Higher Ed and The Chronicle of Higher Education. He served as the founding chair of the board of the Character Collaborative for six years and is currently principal and co-founder of the consulting firm Enrollment Intelligence Now. Massa earned a bachelor's degree from the University of Rochester in 1973 and a doctorate in higher education from Columbia University in 1980.*



### **Paul Nicholas, MA**

Founder & CEO Alma Mater  
Educational Services  
HECA, NACAC, NCTA, WACA

*Paul Nicholas is currently a third year Masters student in the Instructional Technology & Media program at Teachers College, Columbia University. He is an independent educational consultant and the founder and CEO of Alma Mater Educational Services, through which he provides comprehensive college and graduate admissions support to students globally.*

*In addition to his graduate studies focused on educational technology, Paul brings professional admissions expertise to his role. He is an active member in leading industry organizations, including NACAC (National Association for College Admission Counseling), WACAC (Western Association for College Admission Counseling), and HECA (Higher Education Consultants Association). He was also an inaugural Fellow of AI in Education, sponsored by MagicSchool AI.*

# Dollars & Degrees Tuesday, May 14th Expert Speakers



## Mark Schaefer

Globally-recognized author, keynote speaker, futurist and business consultant who blogs one of the top five marketing blogs worldwide.

*He teaches graduate marketing classes at Rutgers University and has written 10 best-selling books. Mark's new book *Belonging to the Brand: Why Community is the Last Great Marketing Strategy* describes an essential new path to connect to customers in the modern digital world. His many global clients include Pfizer, Cisco, Dell, Adidas, and the US Air Force. He has been a keynote speaker at prestigious events all over the world, including SXSW, Marketing Summit Tokyo, and the Institute for International and European Affairs. Mark has appeared as a guest on media channels such as CNN, The Wall Street Journal, The New York Times, and CBS News.*

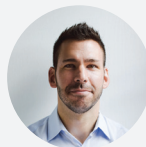


## Adam S. Minsky, Esq.

One of the nation's leading authorities in student loan law. Author, speaker and senior contributor at Forbes.com

*He remains one of the only attorneys in the country with a practice devoted entirely to helping student loan borrowers and their families. Attorney Minsky provides counsel, legal assistance, and direct advocacy for borrowers on a variety of student loan-related matters. He has been interviewed by major national media outlets including The New York Times, NPR, The Boston Globe, The Washington Post, and The Wall Street Journal, and has been named a Massachusetts Super Lawyer "Rising Star" multiple times since 2015. He has published three handbooks and is a senior contributor at Forbes.com.*

*Attorney Minsky received his undergraduate degree, with honors, in Philosophy and Political Science from Boston University, and his law degree from Northeastern University School of Law.*



## Elliot Felix

Getting the best ROI from college

*Elliot Felix is an author, speaker, teacher, father, and consultant to more than a hundred colleges and universities. He uses his background in design to make college work for all students by improving the spaces they learn and live in, the support services they rely on, and the technology they use.*

*Over the last 20 years, he has spoken at SxSW Edu, taught courses on innovation, and worked with more than 100 universities including Carnegie Mellon, MIT, NYU, NC State, and the University of Virginia. brightspot strategy, the education consulting company he founded in 2011 was acquired by Buro Happold in 2020 and has improved the experience of more than 1,000,000 students.*

## Canadian Colleges

### St. Mary's University

Saint Mary's University is one of Canada's top primarily undergraduate universities known for its international collaborations, leadership in entrepreneurship, and research that benefits local and global communities. Our programs in Arts, Science, Graduate Studies and the Sobey School of Business are among Canada's best and feature professors who are committed to the success of their students. Saint Mary's provides our more than 6,600 students with a place that fosters possibility, excellent research opportunities, and distinguished graduate and professional programs combined with a caring community. Nestled in the heart of Halifax, Nova Scotia, on Canada's east coast, Saint Mary's University is marked by iconic buildings, green spaces and fresh ocean air. The Saint Mary's University community is committed to a prosperous future for the world—a World without limits.

Lauren Cullen, BComm, MEd (she/her) Acting Director, Domestic and International Recruitment and Marketing

### University of Waterloo

University of Waterloo is a leading global innovation hub that drives economic and social prosperity for Canada and the world. With more than 41,000 students, we are home to the world's largest co-op education talent pipeline, to game-changing research and technology, and to an unmatched entrepreneurial culture. Together, these create partnerships and solutions to tackle today's and tomorrow's challenges. Find out more at [uwaterloo.ca/future](http://uwaterloo.ca/future).

Valerie Herteis (she/her), International Recruitment Specialist, Marketing & Undergraduate Recruitment

### University of Toronto

The University of Toronto is a public research university in Toronto, Ontario, Canada, located on the grounds that surround Queen's Park. It was founded by royal charter in 1827 as King's College, the first institution of higher learning in Upper Canada. Canada's top university, and a catalyst for discovery, innovation, and progress.

Lydia Palmer (she/her) Manager, International Student Recruitment Office of Student Recruitment | University Admissions & Outreach

# NCAG Quick Content

## Important information to help you in the college affordability niche:

### Julie Spak, IEC

**Topic:** Navigating choices between AP and Dual Enrollment in High School: Will these options make college more affordable?

Julie will discuss Understanding the student's (and family's) goals before enrolling in Advanced Placement (AP) or Dual Enrollment (DE) courses. How to determine what courses the student's possible colleges will accept for credit, will these classes shorten the time and money spent on college? Additionally, exploring academic, college major, and career interests through DE and AP courses.

Since 1985, Julie has been connecting students to their futures in her work as a College Admissions Officer, Financial Aid Officer and Honors Program Counselor at the University of New Hampshire, where she received her M.Ed in Counseling and BA in Communication and English. Julie also worked as a School Counselor, so she knows how to help students and families from "both sides of the desk." She is a Past President of New Hampshire School Counselors Association and is currently a member of the Pennsylvania School Counselors Association and National College Advocacy Group (NCAG). Julie is Birkman certified.

Working as a Career Coach & Educational Consultant combines all of her passions of helping students learn about their strengths and finding the best fit college major and institution while keeping finances in mind. Julie's coaching produces a stand-out college application and also accelerates the career search during college and beyond.

Julie lives in suburban Philadelphia with her husband and two active boys, where there is truly never a dull moment!

### Beth Howland

**Topic:** Common challenges students many encounter during undergraduate years and resources you can recommend.

Beth will discuss how families make significant investments of money, time, effort and emotion throughout their students' college education. Hear about some of the most common challenges students may encounter during their undergraduate experience. Learn about resources, both on and off campus, that support families and help optimize their return on investment.

Beth Howland's passion for working intensively and one-on-one with undergraduates during their transition to and journey through college led to the formation of College Navigators, LLC in 2022. Beth, a college student success coach, utilizes her advising and mentoring skills and leverages her 23 years of experience at a variety of institutions to assist families in maximizing their ROI. Beth helps students navigate the ins-and-out, ups-and-downs, and highs-and-lows during these transformative years. Immediately prior to starting College Navigators, Beth worked for 14 years at Cornell University in both direct service and leadership roles within student development in the College of Engineering, the Hotel School, and the Office of Undergraduate Biology. Beth graduated with honors from Ithaca College and is a two-time NCAA National Champion, Academic All-American, and Hall of Fame inductee for women's soccer. She has an advanced degree in health and human performance with a concentration in sport psychology.

## Monday's Agenda

- 1 **Peter Lampert**  
NCAG President
- 2 **Brad Barnett**  
The New FAFSA
- 3 **Julie Spak**  
AP and Dual Enrollment
- 4 **Al Dickens**  
LEAP Program
- 5 **John Hupalo**  
SAI calculator
- 6 **Paul Nicholas**  
Affordability and AI
- 7 **Dr. Robert Massa**  
Affordability
- 8 **Attendees**  
Financial Roundtable

## Tuesday's Agenda

- 1 **Elliot Felix**  
Getting the best ROI from college
- 2 **NCAG**  
Financial Certification
- 3 **Mark Schaefer**  
Schaefer, New Marketing
- 4 **Beth Howland**  
College student trends
- 5 **Adam Minsky**  
Esq. Today's student loans
- 6 **Canadian Colleges**
- 7 **Attendees**  
Financial Roundtable

Thank you to all of our Speakers for their time and expertise for NCAG's 2024 annual conference. We appreciate the time of our NCAG board members that made this conference possible. Please consider joining our professional organization. As an appreciation to our presenters please consider reaching out, recommending or promoting when appropriate.