



# NCAG Annual Conference 2023 Virtual Agenda

## Embracing Change -

Join NCAG as we welcome expert, engaging speakers on topics of change.

### Monday, May 22

Start Time : 7:30 am PDT/10:30 am EDT

End Time : approx. 3:00/6:00 pm

### Tuesday, May 23

Start Time : 7:30 am PDT/10:30 am EDT

End Time : approx. 3:00/6:00 pm

## Conference Highlights

Nationally Ranked Speakers

Financial Aid Topics | Real Life Case Studies

Roundtable Discussions

NCAG's exclusive CCA program, covering both academic and financial aspects of college planning

For questions about NCAG, the conference or assistance joining NCAG please contact **Liane Crane** – [liane@ncagonline.org](mailto:liane@ncagonline.org) )

## Why NCAG?

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 NCAG difference;

Professionals representing every area of the college process: admission counselors, accountants, IECs, financial planners, tutors, FAFSA experts, and more. We are all 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 like-minded professionals?

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

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

## NCAG's CERTIFIED COLLEGE ADVISOR Program

Attention all professional academic and financial college planners!

Take your career to the next level with the Certified College Advisor (CCA) certification program offered exclusively by NCAG, Inc. This unique certification program is designed to provide a foundational level of knowledge in college planning from both academic and financial perspectives.

The CCA certification program requires preparedness through recommended reading and informational videos. When ready, there is one test with two parts, part one covers college admissions and part two covers college financials. Upon successful completion, you will receive a special listing on the NCAG website, a certification document, recognition at the NCAG Conference, and the use of the CCA initials on your business cards or company-produced documents.

As a CCA, you will be equipped with the knowledge and tools to help your clients navigate the complex world of college planning. Join the exclusive community of NCAG members who are Certified College Advisors.

As an NCAG member, the exam and certification are included in your membership fee. Register for the CCA certification program today and take the first step towards advancing your career. Visit [ncagonline.org](http://ncagonline.org) for more information or to register for the exam.



## KEYNOTE SPEAKERS



**Changes and Updates with 529 Plans**  
**Mark Kantrowitz**  
President, Cerebly Inc.



**Coming in 24-25: The New FAFSA**  
**Brad Barnett**, MS, AFC®, CPFM, FAAC®  
Associate Vice President for Access and Enrollment Management/  
Financial Aid Director, James Madison University  
NASFAA National Chair

Thank you to all of our Speakers for their time and expertise for NCAG's 2023 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.

# NCAG Virtual Conference Agenda

Monday, May 22

7:30-3:00 PST | 10:30-6:00 EST

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## Welcome

**Steven Sirot 10:30 am EST**  
NCAG President  
<https://www.ncagonline.org/>

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## Coming in 24-25: The New FAFSA

**Brad Barnett 11:00 am EST**  
MS, AFC, CPFM, FAAC  
Assoc VP for Enrollment  
Management,  
FA Director James Madison U  
NASFAA National Chair  
<https://www.nasfaa.org/>

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## The Future of College Financing

**Daniel Kahn 1:15 pm EST**  
COO Sparrow  
<https://www.sparrowfi.com/>

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## FAFSA change examples

**Paula Bishop 12:15 pm EST**  
CPA - Financial Aid for  
College Advisor  
<https://www.paulabishop.com/>

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## Declutter your Digital Life

**Alex Brzozowski 2:00 pm EST**  
Founder/CEO - Be Organizing  
<https://beorganizing.com/>

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## How to Borrow Smarter for College

**Meagan McGuire 3:15 pm EST**  
CSLP - StudentLoanPlanner.com  
[www.financialcoachmeagan.com](http://www.financialcoachmeagan.com)

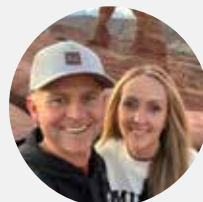
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## Integrating College Funding & Admissions

**Todd Weaver 4:30 pm EST**  
President - Strategies for College  
<https://strategiesforcollege.com/>

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## College finance discussion

**Lance Morgan 4:30 pm EST**  
Legetty / College Funding Secrets  
<https://legetty.com/>

# NCAG Virtual Conference Agenda

Tuesday, May 23  
7:30 -3:00 PST | 10:30-6:00 EST

## Welcome Back

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### CCA: The Gold Standard for College Planning

**Al Hoffman 10:30 am EST**  
NCAG Board Member  
[collegefundingservicecenter.com](http://collegefundingservicecenter.com)

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### NCAG's Exclusive CCA Designation

**Ryan Clark 10:30 am EST**  
NCAG Board Member  
[www.clarkcollegeconsulting.com](http://www.clarkcollegeconsulting.com)

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### New Developments with 529 Plans

**Mark Kantrowitz 11:30 am EST**  
President, Cerebly, Inc.  
Leading national expert on student financial aid  
<http://www.kantrowitz.com>

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### College Financial Aid Case Studies

**Cyndy McDonald 12:45 pm EST**  
CEP/MA/PPS  
NCAG Committee Chair  
[www.CyndyMcDonald.com](http://www.CyndyMcDonald.com)

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### Business Succession Planning

**Daniel Koven 2:00 pm EST**  
FA - Corio & Associates  
[www.corioassociates.com/](http://www.corioassociates.com/)

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### Business Succession Planning

**Jay Clark 2:00 pm EST**  
FA - Lucent Advisors  
[www.lucetadvisors.com/](http://www.lucetadvisors.com/)

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### A Student is NOT a Statistic!

**Wendy Nelson 3:30 pm EST**  
Director of Data - College Aid Pro  
<https://collegeaidpro.com/>

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### College Finance Discussion

**Stuart Siegel**  
FAFSAssist.com  
[www.financialaidnow.com/](http://www.financialaidnow.com/)



About Sparrow



## Our mission is to make education accessible and affordable for all

Sparrow is a technology company that builds financial software to power equitable lending. Borrowers rely upon Sparrow to find the most affordable student loan. Businesses build upon Sparrow's platform to offer their users access to student loans.



## College Aid Pro.

Helping to end the student debt crisis. IECs, advisors, parents - find out the best way to afford college with CAP. [www.collegeaidpro.com](http://www.collegeaidpro.com)

## Daniel Koven

Financial Advisor  
CA Insurance License # OM64997  
Corio & Associates, LLC  
Office: 610-293-8306 | Cell: 610-960-7489 |  
Fax: 610-293-8399

Schedule a free consult for your business questions with Daniel Koven today.



## Be Organizing Free Offer:

FREE Digital Organizing Initial Assessment. Save time, maximize efficiency, reduce stress and gain peace of mind by taking your first step to organize your digital life. In this Free Initial Assessment, we discuss your specific digital organizing goals, challenges and assign a lead Professional Digital Organizer from our team that would be the best fit for you.

- ✓ The Initial Assessment is 30-45 minutes.
- ✓ The meeting is virtual.
- ✓ Everything is confidential.

<https://beorganizing.com/assessment/> Meredith Young  
Customer Care & Executive Assistant

P: 858-480-1056  
E: [contact@beorganizing.com](mailto:contact@beorganizing.com)  
[beorganizing.com](http://beorganizing.com)

## Meagan McGuire, CSLP

Whether in debt or taking on debt - meet with a professional to understand all of your options.

Book a free 15 minute consultation with Meagan at [studentloanplanner.com](http://studentloanplanner.com)



Welcome to THE college admissions industry podcast! Join Mike Bergin and Amy Seeley every Tuesday and Friday as they discuss the latest issues in testing, admissions, learning, and education with leading experts.  
<https://gettestbright.com/tests-and-the-rest/>