

Saving for College



The cost of education is a significant financial challenge for many families, with annual tuition and fees averaging more than \$40,000/year for private college. Join Vivian Tsai, CIMA®, as she shares insights on how to save for college. She will discuss:

- *Trends in College Costs and Outlook*
- *How most families pay for college*
- *Overview of 529 plans as a tool to help save for college and answer top 10 questions on 529 plans*
- *Her own experience, having just graduated her two sons from Cal Poly SLO and Cal Berkeley.*

Date: Saturday, November 11, 2023

Time: 10 AM

Location: Full Life Christian Center
3535 Balboa Street
San Francisco, CA 94121

Sign up to attend:

<https://tinyurl.com/yp5fmd>

About the speaker:

Vivian Tsai, CIMA®

Vivian leads the State Relationship Management and Field Consulting teams within the TIAA Education Savings business with oversight of more than \$43 billion in 529 plan assets across eight 529 college savings plans and 1.4 million college savers. She is responsible for State sponsor relationship management, including contractual compliance, ensuring client satisfaction, and driving plan growth and strategy across State plans. Prior to joining TIAA in 2014, Vivian spent nine years with BlackRock in institutional product management and sales roles. Vivian began her career in financial services in the wealth management businesses of Morgan Stanley and Merrill Lynch, and has worked in San Francisco, Hong Kong, Taipei, Los Angeles and New York.

Vivian is Chair of the Board of the College Savings Foundation and a member of the Governance Committee of the College Savings Plan Network of the National Association of State Treasurers. She is President of Board of the Junior State of America, a national non-partisan civics education and leadership organization for high school students. Vivian has been a Certified Investment Management Analyst and a Certified Private Wealth Advisor since 2007 and she received her Bachelor of Science degree in Economics from the Wharton School of the University of Pennsylvania. She is FINRA Series 7, 66, 24, 31, 51 registered.