

# PROMISE INDIANA DEEP DIVE DAY



Thursday, February 23, 2017

10:00 am-4:00 pm

Conner Prairie Interactive History Park

13400 Allisonville Rd., Fishers, IN - Overlook Room

## SPEAKER BIOS



### **CARL RIST, Senior Director, Children's Savings and Senior Advisor, Asset Building, Corporation for Enterprise Development (CFED)**

Carl Rist has spent 25 years at the Corporation for Enterprise Development (CFED), working on a variety of strategies to expand economic opportunity and help lower-income households build wealth and financial security. Presently, Mr. Rist is the Director of Children's Savings and a Senior Advisor on Asset Building. In this capacity, Mr. Rist directs CFED's efforts, including field building, public policy advocacy, and consulting services, to ensure that more than a million low-income children have access to children's savings accounts (CSAs). Prior to this, Mr. Rist launched and directed the 1:1 Fund, a fundraising and marketing tool created by CFED that makes it easy for donors, large and small, to help children save for college by matching their contributions in CSAs.

Mr. Rist's experience with children's savings accounts also includes directing the SEED (Savings for Education, Entrepreneurship and Downpayment) Policy and Practice Initiative (2003-2009), a multi-year, multi-site initiative that was the first national demonstration of matched savings accounts for children and youth. He is also the co-author of numerous publications about children's saving, including *Hope in Concrete Form: Children's Savings Accounts and the Save and Invest Economy*; *From Piggy Banks to Prosperity: A Guide to Implementing Children's Development Accounts*; and *Children's Savings Accounts: A State Policy Sourcebook*.

Mr. Rist earned an M.A. in public policy in 1991 from the Sanford Institute of Public Policy at Duke University. He also holds an undergraduate degree from Davidson College.



### **CLINT KUGLER, Founder, Promise Indiana, CEO Wabash County YMCA**

Clint Kugler is a 20 year YMCA professional and currently serves as the CEO of the Wabash County YMCA. In 2013, Indiana Governor, Mike Pence, honored Clint with the State's prestigious Sagamore of the Wabash Award for the development and leadership of Promise Indiana: a research-based, asset-rich college and career readiness initiative, helping youth establish child savings accounts and forming college-saver identity through classroom activities. Through a deep partnership with the Indiana Education Savings Authority, Clint and his team have led the activation of 14 Promise Indiana communities which have assisted over 10,000 elementary students establish college savings accounts.

Clint is a regular lecturer at Brown School of Social Work at Washington University in St. Louis, and presenter at state and national conferences. On a national level, Clint has worked organizations including the Federal Reserve Bank, Consumer Financial Protection Bureau, and KU's Center for Assets, Education and Inclusion to refine 529 policy and CSA delivery systems. As a consultant, Clint has helped develop, launch and strengthen CSAs programs throughout the US and Canada. He is a graduate of Olivet Nazarene University, and earned a Master's Degree in Human Service from Springfield College. Clint and his wife Kindi have four children.



**PHIL MAURIZI, Vice President of Promise Operations, Director of Continuous Improvement, Wabash County YMCA**

Phil Maurizi is the Vice President of Promise Indiana Operations. The Promise is a community-owned Children's Savings Account intervention designed to equip young children and their families with the financial resources, college-bound identities, community support, and savings behaviors associated with positive educational outcomes. The Promise is currently activated in 14 Indiana counties, and it will expand to 20 Indiana counties by 2017. The Promise directly impacted over 20,000 Indiana youth in 2016. Phil is responsible for the support, evaluation and refinement of the Promise Indiana model as it expands to pilot communities throughout the state and beyond.

Phil received his Master of Business Administration degree from Taylor University in Upland, IN. Before joining Promise Indiana, Phil worked nearly a decade in Higher Education with the retention and persistence of first-generation and at-risk college students, and he has done extensive work with academic and career advising.



**TROY MONTIGNEY, Executive Director, Indiana Education Savings Authority**

Troy Montigney is Executive Director of the Indiana Education Savings Authority (IESA), working to grow participation and investment in the state's tax-advantaged CollegeChoice 529 Savings Plans beyond their current 315,000 accounts and \$3.6 billion in assets under management.

He currently serves on the Indiana Commission for Higher Education's 21st Century Scholars Advisory Council and as national co-chair of the College Savings Plans Network (CSPN) Federal Initiatives committee, advocating for 529 programs at the congressional level.

Prior to joining the IESA, Troy was Political Affairs Manager for the Indy Chamber, leading its bipartisan Business Advocacy Committee PAC to record fundraising in 2014. Troy also previously worked as a Legislative Assistant for the Indiana Department of Child Services and held campaign roles with the Indiana Republican Party and Susan Brooks for Congress.

Troy is the Indiana Leadership Forum's 2014 class president and a member of its board of directors. He is a 2016 graduate of United Way of Central Indiana's Leadership United program and a member of its Emerging Leaders public policy committee. Troy also serves on the United States Global Leadership Coalition's Indiana Advisory Committee and volunteers as a Starfish Initiative student mentor. Troy is a proud graduate of DePauw University (B.A., Communication).

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## SPEAKER & PANELIST CONTACT INFORMATION

**Ashley Bice**, Executive Director, Benton Community Foundation

[ashley@bentoncf.org](mailto:ashley@bentoncf.org)

**Jason Callahan**, Superintendent, Wabash City Schools

[callahaj@apaches.k12.in.us](mailto:callahaj@apaches.k12.in.us)

**Patty Grant**, Executive Director, Community Foundation of Wabash County

[patty@cfwabash.org](mailto:patty@cfwabash.org)

**Doug Inman**, Executive Director, The Portland Foundation

[tpf@portlandfoundation.org](mailto:tpf@portlandfoundation.org)

**Clint Kugler**, Founder, Promise Indiana, CEO, Wabash County YMCA

[ckugler@wabashcountyyymca.org](mailto:ckugler@wabashcountyyymca.org)

**Alyse Lee**, Community Investment Officer, Central Indiana Community Foundation

[alysel@cicf.org](mailto:alysel@cicf.org)

**Phil Maurizi**, Vice President of Promise Operations, Director of Continuous Improvement, Wabash County YMCA

[pmaurizi@wabashcountyyymca.org](mailto:pmaurizi@wabashcountyyymca.org)

**Troy Montigney**, Executive Director, Indiana Education Savings Authority

[tmontigney@tos.in.gov](mailto:tmontigney@tos.in.gov)

**Carl Rist**, Senior Director, Children's Saving and Senior Advisor, Asset Building, Corporation for Enterprise Development (CFED)

[crist@cfed.org](mailto:crist@cfed.org)

**Andrea Spaeth**, Director of Student Services, Lawrenceburg Community School Corporation

[aspaeth@lburg.k12.in.us](mailto:aspaeth@lburg.k12.in.us)