# TUITION ACCOUNT PROGRAM
# ADVISORY BOARD MEETING

*November 18, 2026, 1:00 p.m.*

## AGENDA

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Call to Order ..... Mr. Stevens

Welcoming Remarks ..... Treasurer Garrity

Tab 1. Administrative Matters ..... Mr. Stevens

Tab 2. 2026 Morningstar Rating ..... Ms. Peachey

Tab 3. PA 529 2025-2026 Annual Report ..... Mr. Stevens

Tab 4. Keystone Scholars 2025-2026 Annual Report .....Ms. McDermott

Tab 5. PA 529 GSP Actuarial Report as of September 30, 2026 ..... Mr. Stevens

Tab 6. PA 529 GSP Investment Performance Report.....Mr. Martin

Tab 7. PA 529 IP Investment Performance Report ..... Ms. White

Tab 8. PA 529 GSP and IP Audits..... Mr. Bonifanti

Tab 9. Program Results ..... Ms. Birnie

Tab 10. Marketing and Outreach Report..... Ms. Holbert
Mr. Dominick

Tab 11. Related Issues and Updates..... Mr. Stevens

Other Business

Adjournment

**Tentative meeting dates for 2027: The meetings will begin at 1:00 p.m.**
**February 17**
**May 19**
**August 18**
**November 17**