



**The Educational experience  
for financial aid professionals.**



**Exceeding Expectations - Cowboy Up!**

# PRELIMINARY PROGRAM

Sunday, July 12

As of April 27, 2009



**If ever there was a year to attend the NASFAA conference, 2009 is it! Join your colleagues from the across the country as we:**

- ★ Hear directly from the Secretary of Education about President Obama's education initiatives
- ★ Choose from dozens of interest sessions and tracks (page 11), including those offered by the Department of Education (page 9)
- ★ Learn more about the National Conversation Initiative (NCI) from NASFAA's President/CEO Dr. Philip R. Day, Jr.

**For the most up-to-date schedule and interest session list, visit [www.NASFAA.org/Conference.asp](http://www.NASFAA.org/Conference.asp)**

**We hope to see you in San Antonio!**

## Sunday, July 12, 2009

8:00 am - 12:30 pm	Registration Open
8:00 am - 12:30 pm	Information Desk Open
8:00 am - 9:00 am	Orientation & Continental Breakfast for 2009-2010 Committee Chairs & Members
9:00 am - 11:30 am	NASFAA Committee & Pre-Conference Meetings (at the call of the chairperson)
10:00 am - 10:45 am	Welcome & Orientation for New Members & First-time Conferees
12:45 pm - 2:15 pm	Opening Session <i>Speaker: The Honorable Arne Duncan, Secretary of Education</i>
2:15 pm - 5:30 pm	ED Resource Room
2:30 pm - 5:30 pm	Registration Open
2:30 pm - 5:30 pm	Information Desk Open
2:30 pm - 3:45 pm	Interest Sessions <i>Advocating for Student Aid Spending in Tough Economic Times</i> <i>Application (FAFSA) Processing Update</i> <i>Creating Meaningful and Memorable Staff Retreats</i> <i>Magic or Misery: What Do You Bring to the Job?</i> <i>Moving from FFEL to Direct Loan</i> <i>National Training for Counselors and Mentors: Perspectives from the Front Lines</i> <i>New Private Student Loan Laws: Workable Solutions</i> <i>Perceptions of Low-Income Students of Color Concerning College Cost and Financial Aid Information Provided by Institutions</i> <i>Simplifying the Financial Aid Application Process</i>

2:30 pm - 3:45 pm

3:45 pm - 4:15 pm

4:15 pm - 5:30 pm

5:30 pm - 7:30 pm

*Taking Control of Your E-Future: How to Create a Technology Plan for the Financial Aid Office*

*The Fab 4 - Involve, Empower, Improve, & Innovate, "All Together Now!"*

*The Student Loan Ombudsman Caucus: Facilitating Creative Solutions for Student Loan Problems and Issues*

*Title IV Grant Programs Update*

*Using Data to Inform Current Issues in Student Aid*

*What Happens When . . . ? Strategies for Working Successfully with Academic Partners*

Financial Aid Business Solutions Seminars

*Sallie Mae - Sallie Mae® Straight Talk Industry Update and Trends in Higher Education Financing*

Break

Interest Sessions

*Are You an Institutional Change Agent on Your Campus?*

*Customer Service Interaction: The Financial Aid Office and the Federal Student Information Center*

*Direct Loan Servicing - Working with Schools*

*Every Default Tells a Story: Look at Yesterday's Defaults to Help Students Today*

*Highlights of Negotiated Rulemaking for Loan Issues Affecting Schools*

*Marketing Our Student Services to Enhance Enrollment and Retention*

*NASFAA Financial Aid Simplification Survey*

*National Student Loan Data System (NSLDS)*

*Reviewing Tax Returns for Verification Purposes*

*The New Perkins Loan Program*

*Transitioning to DL? Newbies Unite!*

*Using NASFAA Tools to Ensure Title IV Compliance*

National Chair's Reception

## Monday, July 13, 2009

7:30 am - 8:45 am	Breakfast for Past Presidents & National Chairs
8:00 am - 8:45 am	Continental Breakfast
8:00 am - 12:00 pm	Registration Open
8:00 am - 12:00 pm	Information Desk Open



8:00 am - 12:00 pm	Exhibit Hall Open		<i>Fiscal Survival for State and Regional Associations</i>
8:00 am - 12:00 pm	ED Resource Room		<i>Improving the Effectiveness of the Federal Student Aid System</i>
8:00 am - 8:45 am	GPIC Networking Breakfast		<i>New Consumer Disclosure Responsibilities of Institutions</i>
9:00 am - 10:15 am	General Session - National Conversation Initiative <i>Speaker: Dr. Philip R. Day, President &amp; CEO, NASFAA</i>		<i>One Minute Researcher</i>
10:15 am - 10:45 am	Break		<i>Simplifying the Financial Aid Application Process</i>
10:45 am - 12:00 pm	Interest Sessions <i>Application (FAFSA) Processing Update</i> <i>Being Pro-Active in a Reactive World</i> <i>Best Practices in Leadership Development</i> <i>Best Practices in Teaching Financial Literacy</i> <i>Experimental Sites – A New Beginning</i> <i>Federal Methodology Changes</i> <i>Financial Aid Administrators: Satisfied and Committed</i> <i>Focus on the Future – Changing Demographics and the Impact on Financial Aid and Admissions</i> <i>Graduate/Professional Discipline Specific Roundtable Discussion</i> <i>Moving from FFEL to Direct Loan</i> <i>Net Price Data Reporting Requirements in HEOA: Data Requirement and Price Calculation</i> <i>New Disclosure Requirements</i> <i>Use of Electronic Means and Social Networking Tools to Communicate to Students</i> <i>Using Multimedia to Simplify the Financial Aid Process</i>		<i>Social Services Ties With Institutions</i> <i>The Future of Loan Repayment (including IBR)</i> <i>The Impact of Enrollment Management on NCAA Financial Aid Regulations at Division III Schools</i> <i>Title IV Regulatory Exposure Outside of the Financial Aid Office</i> <i>Title IV Student Loans Update: FFEL, Direct Loans, and Perkins</i> <i>Update: Scholarship for Disadvantaged Students (SDS) and HHS Campus Based Loan Programs</i> <i>Use Excel to Change Data into Information</i>
		4:00 pm - 4:30 pm	Break
		4:30 pm - 5:45 pm	Interest Sessions <i>Building Bridges: University and School District Partnerships That Last</i> <i>Common Manual: The School Voice in Common Policy</i> <i>Diversity Connections</i> <i>DL Schools—Birds of a Feather</i> <i>Dual Degrees, Consortiums, Contractual Agreements</i> <i>Enrollment Services' One-Stop Shop: The Customer Service Aspect of Financial Aid, Admissions, Registration and Fiscal Services.</i> <i>Four Generations at Work in the Financial Aid Office</i> <i>Public Service Loan Forgiveness and Income-Based Repayment</i> <i>Research Highlights from your Colleagues - Everyday Research Can Lead to Better Service and a More Data Driven Direction</i> <i>Successful Outreach Practices in the Financial Aid Office</i> <i>TEACH Grant Program</i> <i>The New Perkins Loan Program</i> <i>Title IV Grant Programs Update</i> <i>Training and the Development of Staff</i> <i>On Your Own</i>
10:45 am - 12:00 pm	Financial Aid Business Solutions Seminars <i>Great Lakes Higher Education Corporation &amp; Affiliates - Cohort Countdown: Getting Ready for 3-Year Default Rates</i>		
12:15 pm - 2:30 pm	Lunch with Speaker - Cowboy Ethics: Getting America Back on Track <i>Speaker: James P. Owen, Founder and Chief Inspiration Officer, Center for Cowboy Ethics and Leadership</i>		
2:45 pm - 5:00 pm	Registration Open		
2:45 pm - 5:00 pm	Information Desk Open		
2:45 pm - 4:30 pm	Exhibit Hall Open		
2:45 pm - 5:00 pm	ED Resource Room		
2:45 pm - 4:00 pm	Interest Sessions <i>Direct Loan Servicing – Working with Schools</i> <i>Diversity and Affordability: Presenting Institutional Data on the Web</i>		
		Evening	

# PRELIMINARY PROGRAM

Tuesday, July 14



## Tuesday, July 14, 2009

**7:00 am - 8:15 am** Breakfast for Regional and State Presidents

**8:00 am - 8:45 am** Continental Breakfast

**8:00 am - 4:30 pm** Registration Open

**8:00 am - 4:30 pm** Information Desk Open

**8:00 am - 3:15 pm** Exhibit Hall Open

**8:00 am - 3:15 pm** ED Resource Room Open

**8:30 am - 10:30 am** NASFAA Annual Business Meeting

**10:30 am - 10:45 am** Break

**10:45 am - 12:00 pm** Interest Sessions

*Do Students Know the Net Cost to Attend Your Institution?*

*Helping Students Transition from Undergraduate to Graduate Programs*

*Identifying the Right Ingredients for a Promising Financial Literacy Program*

*Institutional Eligibility Issues Every Aid Administrator Should Know About*

*Simplifying the Financial Aid Application Process*

*TEACH Grant Program*

*The New Perkins Loan Program*

*The Post 9/11 Veterans Education Assistance Act: Overview and a School Perspective*

*Title IV Grant Programs Update*

*Tuition Benefit Programs-Another Form of Financial Aid?*

*Using NCES NPSAS Databases to Answer Your Financial Aid Questions - Part I*

*Web Services for Parents*

*What You Need to Know About Working with the Media*

**10:45 am - 12:00 pm** Financial Aid Business Solutions Seminars

*Great Lakes Higher Education Corporation & Affiliates - Cohort Countdown: Getting Ready for 3-Year Default Rates*

**12:00 pm - 1:15 pm** Networking Lunch in the Exhibit Hall

**1:30 pm - 2:45 pm** Interest Sessions

*"You Mean There's Money to Go to College?" Community Outreach Programs that Work!*

*A Veteran Friendly Campus: West Virginia University's Journey*

*Developing a Cost of Attendance Budget for Graduate/Professional Students*

*Encouraging Parents and Students to Have "The Money Talk"*

*Experimental Sites – A New Beginning*

**2:45 pm - 3:15 pm**

**3:15 pm - 4:30 pm**

*Moving from FFEL to Direct Loan*

*NASFAA Board Town Hall Meeting*

*Outreach Collaborations with the Financial Aid Office*

*Pinstripes or Pink Slips*

*Roundtable for Regional & State Governmental Relations Chairs*

*Successfully Managing a Program Review*

*Title IV Student Loans Update: FFEL, Direct Loans, and Perkins*

*Using NCES NPSAS Databases to Answer Your Financial Aid Questions - Part II*

Break

Interest Sessions

*A Template for Conducting an RFI Process Application (FAFSA) Processing Update*

*Bananas, Garlic Onions, & A Deck of Cards: Developing Your Professional Judgment Framework*

*Do I Have to Be a Cop? Detecting and Reporting Financial Aid Fraud*

*Highlights of Negotiated Rulemaking for General Provisions and Non-Loan Programmatic Issues*

*National Student Loan Data System (NSLDS)*

*Public Service Loan Forgiveness and Income-Based Repayment*

*Results of the Survey of Graduate Aid Policies, Practices & Procedures (SOGAPPP)*

*The Politics of Leading a Financial Aid Office - Tailoring Your Approach*

*Understanding and Implementing the New Independent Student Definition*

*Using IPEDS Online Data Tools and New Net Price Calculator – Part I*

*You Are the New Director of Financial Aid - What's Next?*



- 4:45 pm - 6:00 pm** Interest Sessions
- Direct Loan Servicing – Working with Schools*
  - Federal Methodology Changes*
  - How to Expedite Financial Aid Processes through Technology*
  - Loan Forgiveness and Discharge*
  - Managing Through Outsourcing*
  - New Consumer Disclosure Responsibilities of Institutions*
  - Recognizing Money Personality in Your Students*
  - TEACH Grant: Implementation From a School's Perspective*
  - The Office Effectiveness Checklist*
  - Using IPEDS Online Data Tools and New Net Price Calculator – Part II*
- 6:00 pm - 8:00 pm** A Fiesta at the Grotto (at the Convention Center)

**Wednesday, July 15, 2009**

- 8:30 am - 11:30 am** Closing Breakfast and Department of Education Update
- Speakers:*  
*Jeff Baker, U.S. Department of Education*  
*David Bergeron, U.S. Department of Education*  
*Dan Madzelon, U.S. Department of Education*

In addition to a general session, ED staff will offer interest sessions featuring only ED staff, participate in two sessions with other NASFAA members and also staff a resource room at the conference.

Descriptions of each of these offerings is featured below.

## Interest Sessions Featuring ED Staff

Department of Education staff will offer a variety of interest sessions at the NASFAA National Conference. Most of these sessions will be offered multiple times. The session titles and descriptions are as follows:

### Application (FAFSA) Processing Update

This session will provide important information on changes to the 2009-2010 FAFSA and the CPS system. Presenters will also share preliminary ideas, including a draft FAFSA, for the 2010-2011 year.

### Direct Loan Servicing – Working with Schools

This session will provide information on how the Direct Loan Servicing System performs its functions and how the Department's servicer works with schools to support the school's current students as well as their former students. Emphasis will be placed on how the Department will work with schools to continue to provide default aversion assistance.

### Experimental Sites – A New Beginning

This session will provide information on the new Department's new approach to the Experimental Sites Initiative authorized by the Higher Education Act. Presenters will discuss the next solicitation of experiments and the criteria under which proposals will be evaluated. Some examples of the kinds of experiments that might be considered will be provided.

### Federal Methodology Changes

This session will review changes made to the calculation of a student's Expected Family Contribution (EFC) as a result of recent legislation. Examples of topics include: Definition of an Independent Student (including Homelessness), Simplified Needs Test, Auto-Zero EFC, Dislocated Worker, Untaxed Income, and Special Combat Pay.

### Moving from FFEL to Direct Loan

This session will provide important information for schools that are converting (or are considering converting) from the FFEL Program to the Direct Loan Program. The session will include a discussion of the responsibilities of a school that participates in the Direct Loan Program, the steps required for the conversion, as well as an overview of the processes and procedures used by Direct Lending schools in their interface with the Department.

### National Student Loan Data System (NSLDS)

This session will explain recent updates to NSLDS and how schools can use NSLDS data for day-to-day financial aid office operations, such as calculating underlying loan amounts of consolidation loans, checking for changes in student eligibility related to default and overpayments, and checking prior disbursements for transfer students.

### New Consumer Disclosure Responsibilities of Institutions

This session will provide a summary of the consumerism and disclosure requirements that institutions must comply with as a result of the Higher Education Opportunity Act. The results of the recently completed negotiated rulemaking on this topic will also be discussed. Topics to be covered include student consumer issues related to campus security and crime reporting, fire safety, textbook costs, etc. In addition, time will be spent on the new school consumerism requirements related to the student loan programs, both federal and private.

### The New Perkins Loan Program

This session will provide an overview of the Administration's proposal to modify and expand the Federal Perkins Loan Program. The proposal would expand the program dramatically, in terms of schools and students served, thus providing needed flexibility for all schools to target Perkins Loans.

### Public Service Loan Forgiveness and Income-Based Repayment

Presenters will first discuss the Public Service Loan Forgiveness Program and how a Direct Loan borrower can be considered for loan forgiveness if employed in a public service job. They will then discuss the new Income Based Repayment (IBR) Plan available to Direct Loan and FFEL borrowers that can limit the monthly payment amount of a borrower.

### Simplifying the Financial Aid Application Process

This session will provide an update on proposals to dramatically simplify the process, formulas, and forms used to determine a student's eligibility for Title IV student assistance.

### TEACH Grant Program

This session will review the requirements and regulations for the TEACH Grant Program. It will include an overview of the program and a discussion of institutional and program eligibility. It will also cover other program topics such as the student's execution of the Agreement to Serve and the requirements for disbursing a TEACH Grant Award.

### Title IV Grant Programs Update

This session will include information about recent statutory, regulatory, and process changes to the Pell Grant, ACG, and National SMART Grant programs. It will include a discussion of "year-round Pell", the expanded student eligibility criteria for ACG and National SMART grants, and the change in the definition of academic year for the ACG and National SMART grant programs.

**Title IV Student Loans Update: FFEL, Direct Loans, and Perkins**

The session will discuss recent statutory and regulatory changes to the Direct Loan, FFEL, and Perkins Loans program. Topics will include changes to annual and aggregate loan limits, use of professional judgment to provide unsubsidized eligibility, changes to loan counseling requirements, and new PLUS repayment and deferment provisions.

**Interest Sessions with Department of Education Staff Participants**

**Customer Service Interaction – The Financial Aid Office and the Federal Student Information Center**

The Federal Student Aid Information Center (FSAIC) handles 6 million calls annually by employing technology and customer service best practices. Applicants contact FSAIC for assistance with issues that fall within the scope of the financial aid office.

This session will feature techniques to train customer service representatives on topics that involve financial aid offices. Share your ideas to enhance these processes to improve training and to provide important guidance to applicants. Discussion will focus on ways to strengthen the relationship between the financial aid community and the FSAIC representatives.

**The Student Loan Ombudsman Caucus: Facilitating Creative Solutions for Student Loan Problems and Issues**

Learn how the new Student Loan Ombudsman Caucus leverages the Ombudsman network to provide problem resolution training and mentoring, identify and report on trends to support positive change through student loan industry best practices and legislation, and serve as the voice for fair process throughout the student loan life cycle. Most importantly, learn how this network can assist you with hard-to-resolve student loan issues.

**Department of Education Resource Room**

Schools and other entities can meet with staff from the Department of Education regarding Student Aid related issues. The room will be an area where participants at the conference can ask specific questions and share concerns regarding their participation in Title IV programs. There will be an Ask a Fed area and other staff will be on hand to address COD and NSLDS issues. Information on ED's new Portal and IFAP screens as well as information on IPM (Integrated Partnership Management) will be available here as well. The Resource Room's hours are:

- Sunday, July 12** 2:15 pm – 5:30 pm
- Monday, July 13** 8:00 am – 12:00 pm  
and 2:45 pm – 5:00 pm
- Tuesday, July 14** 8:00 am – 3:15 pm

**SESSIONS BY TRACK**

**Customer Service**

- A Veteran Friendly Campus: West Virginia University's Journey
- Being Pro-Active in a Reactive World
- Counseling, Communicating and Caring: Working with Families in Financial Crisis
- Customer Service Interaction: The Financial Aid Office and the Federal Student Information Center
- Enrollment Services' One-Stop Shop: The Customer Service Aspect of Financial Aid, Admissions, Registration and Fiscal Services.
- The Student Loan Ombudsman Caucus: Facilitating Creative Solutions for Student Loan Problems and Issues
- Web Services for Parents

**Enrollment Management**

- Focus on the Future – Changing Demographics and the Impact on Financial Aid and Admissions
- The Impact of Enrollment Management on NCAA Financial Aid Regulations at Division III Schools
- Tuition Benefit Programs-Another Form of Financial Aid?

**Financial Literacy**

- Best Practices in Teaching Financial Literacy
- Identifying the Right Ingredients for a Promising Financial Literacy Program
- Recognizing Money Personality in Your Students
- Tried and True Experience in Financial Literacy Delivery Systems: Best Results in Peer-to-Peer, Group Activity and Online Formats

**Generational**

- Marketing Our Student Services to Enhance Enrollment and Retention

**Graduate/Professional Issues**

- Developing a Cost of Attendance Budget for Graduate/Professional Students
- Dual Degrees, Consortiums, Contractual Agreements
- Graduate/Professional Discipline Specific Roundtable Discussion
- Helping Students Transition from Undergraduate to Graduate Programs
- Results of the Survey of Graduate Aid Policies, Practices & Procedures (SOGAPPP)
- The Future of Loan Repayment (including IBR)
- Update: Scholarship for Disadvantaged Students (SDS) and HHS Campus Based Loan Programs

**Loans**

- A Template for Conducting an RFI Process
- Common Manual: The School Voice in Common Policy
- DL Schools--Birds of a Feather
- Every Default Tells a Story: Look at Yesterday's Defaults to Help Students Today
- Loan Forgiveness and Discharge
- New Private Student Loan Laws: Workable Solutions
- Transitioning to DL? Newbies Unite!

## Management

Are You an Institutional Change Agent on Your Campus?  
 Creating Meaningful and Memorable Staff Retreats  
 Four Generations at Work in the Financial Aid Office  
 Managing Through Outsourcing  
 The Fab 4 - Involve, Empower, Improve, & Innovate, "All Together Now!"  
 The Office Effectiveness Checklist  
 The Politics of Leading a Financial Aid Office - Tailoring Your Approach  
 Using NASFAA Tools to Ensure Title IV Compliance

## Other Resources

What You Need to Know About Working with the Media

## Philosophical

Encouraging Parents and Students to Have "The Money Talk"  
 Financial Aid Administrators: Satisfied and Committed

## Professional Development

Bananas, Garlic Onions, & A Deck of Cards: Developing Your Professional Judgment Framework  
 Best Practices in Leadership Development  
 Fiscal Survival for State and Regional Associations  
 Magic or Misery: What Do You Bring to the Job?  
 NASFAA Board Town Hall Meeting  
 Pinstripes or Pink Slips  
 Training and the Development of Staff  
 What Happens When . . . ? Strategies for Working Successfully with Academic Partners  
 You Are the New Director of Financial Aid - What's Next?

## Reauthorization/Legislative

Advocating for Student Aid Spending in Tough Economic Times  
 Improving the Effectiveness of the Federal Student Aid System  
 NASFAA Financial Aid Simplification Survey  
 New Disclosure Requirements  
 Roundtable for Regional & State Governmental Relations Chairs  
 TEACH Grant: Implementation From a School's Perspective  
 The Post 9/11 Veterans Education Assistance Act: Overview and a School Perspective

## Regulatory

Do I Have to Be a Cop? Detecting and Reporting Financial Aid Fraud  
 Institutional Eligibility Issues Every Aid Administrator Should Know About  
 Social Services Ties With Institutions  
 Successfully Managing a Program Review  
 Title IV Regulatory Exposure Outside of the Financial Aid Office  
 Understanding and Implementing the New Independent Student Definition  
 Using Multimedia to Simplify the Financial Aid Process

## Research

NCES NPSAS Databases to Answer Your Financial Aid Questions - Part I  
 Net Price Data Reporting Requirements in HEOA: Data Requirement and Price Calculation  
 One Minute Researcher  
 Perceptions of Low-Income Students of Color Concerning College Cost and Financial Aid Information Provided by Institutions  
 Research Highlights from your Colleagues - Everyday Research Can Lead to Better Service and a More Data Driven Direction  
 Using Data to Inform Current Issues in Student Aid  
 Using IPEDS Online Data Tools and New Net Price Calculator - Part I  
 Using IPEDS Online Data Tools and New Net Price Calculator - Part II

Using NCES NPSAS Databases to Answer Your Financial Aid Questions - Part I  
 Student Access & Diversity  
 "You Mean There's Money to Go to College?" Community Outreach Programs that Work!

## Student Access & Diversity

Building Bridges: University and School District Partnerships That Last  
 Diversity and Affordability: Presenting Institutional Data on the Web  
 National Training for Counselors and Mentors: Perspectives from the Front Lines  
 Outreach Collaborations with the Financial Aid Office  
 Successful Outreach Practices in the Financial Aid Office

## Taxes

Reviewing Tax Returns for Verification Purposes

## Technology

Do Students Know the Net Cost to Attend Your Institution?  
 How to Expedite Financial Aid Processes through Technology  
 Taking Control of Your E-Future: How to Create a Technology Plan for the Financial Aid Office  
 Use Excel to Change Data into Information  
 Use of Electronic Means and Social Networking Tools to Communicate to Students



## Sunday, July 12th

### Opening Session

12:45 pm – 2:15 pm

*Speaker: The Honorable Arne Duncan, Secretary of Education*

See Today's News from April 24 and the NASFAA Web site for information about Secretary Duncan.

### National Chair's Reception

5:30 pm – 7:30 pm

Join National Chair David Gruen in the NASFAA Exhibit Hall for networking with your colleagues across the nation. This is a great way to reconnect with colleagues you have not seen in the past year, meet new friends and learn about the products and services that our offered by our exhibitors.

## Monday, July 13th

### General Session

National Conversation Initiative  
9:00 am – 10:15 am

*Speaker: Dr. Philip R. Day, President & CEO, NASFAA*

NASFAA President and CEO Dr. Philip Day will provide an overview and update on NASFAA's National Conversation Initiative. The NCI project addresses the role that financial aid can play in creating a new roadmap for success in higher education, and addresses the larger issues regarding the future of student financial assistance and access, and how the financial aid system can be reformed to better serve students and families, particularly those from underserved and underrepresented populations. Join us as we discuss the preliminary NCI recommendations released this spring and the next steps for the project.

### Luncheon with Speaker

Cowboy Ethics: Getting America Back on Track  
12:15 pm – 2:30 pm

*Speaker: James P. Owen, Founder and Chief Inspiration Officer, Center for Cowboy Ethics and Leadership*

Jim Owen is Founder and Chief Inspiration Officer of the Center for Cowboy Ethics and Leadership and author of the books *Cowboy Ethics: What Wall Street Can Learn from the Code of the West* and *Cowboy Values: Recapturing What America Once Stood For*.

Jim's Wall Street career spanned 40 years, including 15 years as a partner with NWQ Investment Management Company in Los Angeles. He is Co-founder and Chairman Emeritus of the Investment Management Consultants Association (IMCA). Profiled in the Wall Street Journal as a leading Wall Street "rainmaker," Jim has also been a prolific speaker and author on investment topics. His investment book credits include *The Prudent Investor* (McGraw-Hill, 1990) and *The Prudent Investor's Guide to Hedge Funds* (John Wiley & Sons, 2000).

In 2004, Jim launched a second career focused on writing, speaking, and thought leadership. Inspired by his lifelong interest in Western history and lore, Jim coined the phrase "Cowboy Ethics" and wrote his book distilling the Code of the West into "Ten Principles to Live By."

Jim is a summa cum laude graduate of Regis University. He is a past President of the Board of Trustees of the Santa Barbara Museum of Art.

## Tuesday, July 14th

### Annual Business Meeting of NASFAA and Passing of the Gavel

8:30 am – 10:30 am

The passing of the gavel, special awards, and recognition will take place at NASFAA's Annual Business Meeting. Conferees will have the opportunity to hear from NASFAA Chair David Gruen and Incoming-Chair Barry Simmons.

*Presiding: David Gruen, 2008-09 NASFAA National Chair and Director, Student Financial Aid, University of Wyoming*

*Call to Order: Dr. Philip R. Day, President & CEO, NASFAA*

*Remarks: David Gruen*

*Passing of the Gavel to: Barry Simmons, 2008-09 NASFAA National Chair and Director, Office of University Scholarships & Financial Aid, Virginia Polytechnic Institute & State University*

*Closing Remarks: Barry Simmons*

### Networking Lunch in the Exhibit Hall

12:00 pm – 1:15 pm

If you miss the reception Sunday evening or just run out of time, here is another opportunity to reconnect with old friends and visit with our exhibitors. Our exhibitors have a lot to talk with you about, please be sure to visit with them.

### A Fiesta at the Grotto

6:00 pm – 8:00 pm

It is time to unwind. Join your fellow conferees at the Convention Center Grotto for food, music and fun.

## Wednesday, July 15th

### Closing Breakfast and Department of Education Federal Update

8:30 am – 11:00 am

A Department of Education panel will present up to date information on Department of Education activities and initiatives. This will include an update of the recently completed negotiated rulemaking sessions resulting from enactment of the Higher Education Opportunity Act and a status report on the Title IV student aid proposals included in the President's FY 2010 Budget. It will also include a discussion of various simplification proposals being considered by the Administration and the Congress.

*Speakers: Jeff Baker, Federal Student Aid, U.S. Department of Education*

*David Bergeron, Office of Postsecondary Education, U.S. Department of Education*

*Dan Madzellan, Office of Postsecondary Education, U.S. Department of Education*

## Corporate Donors

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## Exhibitors

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Access Group  
ACS  
American Student Assistance  
Campus Management Corporation  
Chase Student Loans  
Citibank Student Loan Corporation  
Citizens Bank  
College Board  
Discover Student Loans  
Dow Lohnes PLLC  
ECMC  
Edamerica  
Edfinancial Services  
EDFUND  
ELM Resources  
Financial Aid TV  
First Marblehead Corporation  
FSSI  
Global Financial Aid Services, Inc.  
Great Lakes Higher Education Corporation & Affiliates  
ImageNow by Perceptive Software, Inc.  
Information Experts  
KeyBank  
Mapping Your Future, Inc.  
NASFAA  
National Endowment for Financial Education  
National Student Clearinghouse  
National Student Loan Program (NSLP)  
Nelnet  
Noel-Levitz, Inc.  
Overture Technologies  
P N C Bank Education Loan Center  
Research Triangle Institute  
Sallie Mae, Inc.  
Sigma Systems, Inc.  
SunTrust Education Loans  
TG  
U.S. Bank Student Banking  
USA Funds  
Wells Fargo Education Financial Services

## Financial Aid Business Solution Seminars

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All Conference attendees are invited to attend a Financial Aid Business Solutions Seminar. These seminars, sponsored and developed by businesses and organizations that serve the financial aid community, may offer insightful management ideas for the financial aid office, share updates on current legislation, provide helpful solutions for working with students, or share information about the company's products and services. They are certainly informative and worth attending.

### Great Lakes Higher Education Corporation & Affiliates Cohort Countdown: Getting Ready for 3-Year Default Rates

Monday, 10:45 AM – 12:00 PM  
Tuesday, 10:45 AM – 12:00 PM

The clock is already ticking on your first cohort default rate under the new 3-year calculation. Are you prepared for the changes? Join us for this seminar to stay one step ahead. Borrowers entering repayment today will form your first 3-year default rate. We'll share fresh data on the challenges they face, and what each of us can do to help them succeed in repayment. You'll come away with a plan to help you achieve a 3-year default rate you can be proud of.

*Moderator:*

*Steve Schmidt, Director of Product Development & Marketing, Great Lakes Higher Education Corporation & Affiliates*

*Presenters:*

*Amy Kerwin, Chief Guaranty Officer, Great Lakes Higher Education Corporation & Affiliates*

*Tasha McDaniel, School Training Director, Great Lakes Higher Education Corporation & Affiliates*

*Steve Schmidt, Director of Product Development & Marketing, Great Lakes Higher Education Corporation & Affiliates*

### Sallie Mae, Inc.

#### Sallie Mae® Straight Talk Industry Update and Trends in Higher Education Financing

Sunday, 2:30 PM – 3:35 PM

The agenda includes an industry and federal legislative update as well as discussion about private credit trends and research on how families are paying tuition costs. We will also be talking about the Sallie Mae Smart Option Student Loan<sup>SM</sup>, our new private credit product and how it can work for your students and your office. These updates will be followed by a Q&A session.

*Moderator:*

*Dennis Wentworth, Senior Vice President, National Sales, Sallie Mae, Inc.*

*Presenters:*

*Barry Feierstein, Executive Vice President, Sales & Marketing, Sallie Mae, Inc.*

**Why San Antonio?**

From the stones of the Alamo to the meandering paths of the River Walk, San Antonio takes you on a journey through a land as grand as its reputation. Walk the lines drawn for independence when you visit the Alamo—one of five Spanish colonial missions. Stroll the cobblestone sidewalks of the River Walk to uncover an outdoor theatre with flamenco dancers and mariachis, nationally acclaimed museums, luxury riverside hotels and sidewalk cafes that offer everything from authentic Tex-Mex to worldly cuisines.

Here, diversity is a way of life; from the colors of the culture to a broad range of attractions.



**Travel Information**

There are over 100 flights daily to San Antonio and the airport is about eight miles from downtown San Antonio or a 15-minute taxi ride. Ground transportation includes SATTRANS airport shuttle.

Find San Antonio International Airport flight information, transit services provided, flight time and mileage on their website, or call (210) 207-3411 for more information.

**If You Drive**

Driving distances to San Antonio from Texas Cities:

- Dallas: 273 miles
- Fort Worth: 267 miles
- Houston: 197 miles
- Brownsville: 278 miles
- El Paso: 551 miles

**Conference Headquarters**

Session, meal functions, and all exhibits will be located at the Henry B. Gonzalez Convention Center.

**Hotel Arrangements**

NASFAA currently has negotiated rates with the Grand Hyatt San Antonio, Marriott Rivercenter, Marriott Riverwalk, and Hilton Palacio del Rio.

Since housing availability is constantly changing, go to [www.nasfaa.org/conference.asp](http://www.nasfaa.org/conference.asp) for the most up-to-date information and to reserve your hotel room.



**Hotel Information**

Hotel	Single	Double	Triple	Quad
1. Grand Hyatt San Antonio 600 East Market Street	\$189 \$224 (Club)	\$189 \$224 (Club)	\$199 \$234 (Club)	\$209 \$244 (Club)
2. Marriott Rivercenter 101 Bowie Street	\$179* \$209 (Club)	\$179* \$209 (Club)	\$189* \$219 (Club)	\$199* \$229 (Club)
3. Marriott Riverwalk 889 East Market Street	\$189 \$209 (Club)	\$189 \$209 (Club)	\$199 \$219 (Club)	\$209 \$229 (Club)
4. Hilton Palacio Del Rio 200 S. Alamo Street	\$170 \$205 (Riverview)	\$170 \$205 (Riverview)	\$180 \$215 (Riverview)	\$190 \$225 (Riverview)

\*This rate includes the Wired for Business package, which includes in-room internet, local phone calls, and domestic US long distance.

# CONFERENCE REGISTRATION



**For immediate confirmation, register online at  
[www.nasfaa.org/conference.asp](http://www.nasfaa.org/conference.asp)**

## INSTRUCTIONS

1. If you are registering more than three individuals from the same institution please photocopy this form.
2. This form must be received by June 12 to ensure the lower conference pre-registration fee of \$525 for members and \$625 for non-members.
3. NASFAA membership is institutional. Individuals who are employed by a NASFAA member are also considered to be members.
4. Registration forms received after June 12 are considered "on-site" registrations and will be charged the higher fee of \$625 for members and \$725 for non-members.
5. Payment does not have to accompany this form. However, all fees must be paid at the time you pick up your registration packet.
6. The cancellation policy is below.
7. Please complete both sides of this registration form.
8. If your company is an exhibitor/sponsor, please complete the special exhibit/sponsor registration form, which can be found on-line at [www.nasfaa.org](http://www.nasfaa.org).
9. Your registration fee includes: all conference sessions and activities, the National Chair's reception, continental breakfasts and lunches, beverage breaks, and the closing session plated breakfast.

## CANCELLATION & REFUND POLICY

1. All requests for cancellations and refunds must be in writing.
2. The date of the cancellation shall be the date the written request is received in the NASFAA office.
3. Cancellation fees will be assessed for both prepaid and non-prepaid registrations.
4. Please provide the name of the registrant cancelling and the address to mail any refund check.
5. **Cancellation Fee Schedule**

Through June 12	\$25.00
June 13 - 26	\$50.00
June 27 - July 8	\$75.00
6. No requests for refunds will be honored after close of business (5:00 pm EDT) on Wednesday, July 8.

## 1. INSTITUTION INFORMATION

Institution:

Address:

City:	State:	Zip:
Phone:	Fax:	E-Mail:
Is Your Institution a NASFAA Member? <input type="checkbox"/> Yes <input type="checkbox"/> No		

## 2. REGISTRANT INFORMATION

### A - Primary Registrant

Name (Mr/Mrs/Ms/Dr):	Title:	
Name/Nickname for Badge:		
Address (If Different from Above):		
City:	State:	Zip:
Phone:	Fax:	E-Mail:
Is this Your First Conference? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Pre-Registration (Through June 12)	<input type="checkbox"/> \$525 (Member)	<input type="checkbox"/> \$625 (Non-Member)
On-Site Registration (After June 12)	<input type="checkbox"/> \$625 (Member)	<input type="checkbox"/> \$725 (Non-Member)
NASFAA Retiree <sup>1</sup>	<input type="checkbox"/> \$210	
Daily Registration (Per Day):	<input type="checkbox"/> \$315 (Member)	<input type="checkbox"/> \$415 (Non-Member)
Select Day(s):	<input type="checkbox"/> Sunday	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday



# CONFERENCE REGISTRATION

## 2. REGISTRANT INFORMATION (CONTINUED)

### B - Additional Registrant

Name (Mr/Mrs/Ms/Dr):		Title:	
Name/Nickname for Badge:			
Address (If Different from Above):			
City:		State:	Zip:
Phone:	Fax:		E-Mail:
Is this Your First Conference?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Pre-Registration (Through June 12)		<input type="checkbox"/> \$525 (Member)	<input type="checkbox"/> \$625 (Non-Member)
On-Site Registration (After June 12)		<input type="checkbox"/> \$625 (Member)	<input type="checkbox"/> \$725 (Non-Member)
Daily Registration (Per Day):		<input type="checkbox"/> \$315 (Member)	<input type="checkbox"/> \$415 (Non-Member)
Select Day(s):	<input type="checkbox"/> Sunday	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday

### C - Additional Registrant

Name (Mr/Mrs/Ms/Dr):		Title:	
Name/Nickname for Badge:			
Address (If Different from Above):			
City:		State:	Zip:
Phone:	Fax:		E-Mail:
Is this Your First Conference?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
Pre-Registration (Through June 12)		<input type="checkbox"/> \$525 (Member)	<input type="checkbox"/> \$625 (Non-Member)
On-Site Registration (After June 12)		<input type="checkbox"/> \$625 (Member)	<input type="checkbox"/> \$725 (Non-Member)
Daily Registration (Per Day):		<input type="checkbox"/> \$315 (Member)	<input type="checkbox"/> \$415 (Non-Member)
Select Day(s):	<input type="checkbox"/> Sunday	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday

**Total Amount Due (2A+2B+2C):**

## 3. PAYMENT INFORMATION

Payment Method:	<input type="checkbox"/> Check Enclosed	<input type="checkbox"/> Purchase Order Enclosed <sup>2</sup>
	<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard <input type="checkbox"/> American Express
Credit Card No.:	Exp Date:	
Name As it Appears on Card:	Amount to be Charged:	
Signature:	Date:	

Be sure to include forms for all individuals covered by this payment  
 Mail to NASFAA, 1101 Connecticut Avenue NW, Suite 1100, Washington, DC 20036-4303. Fax to: (202) 785-1487  
 Questions? Call (202) 785-6964, or e-mail [campbellm@nasfaa.org](mailto:campbellm@nasfaa.org)

<sup>1</sup> This rate is available to any member of the NASFAA Retiree Group, a network of individuals who are retired from the financial aid profession and are no longer employed full-time at an educational institution or in a financial aid-related enterprise.

<sup>2</sup> A purchase order is not considered payment. All fees must be paid at the time you pick up your registration packet