
JUNE 06, 2017

AGENDA ITEM 06
INFORMATION ITEM

CALIFORNIA ABLE ACT BOARD

529A Investment Consultant Update: Eric White and Kay Ceserani (Pension Consulting Alliance LLC)

Information Item

The contract for 529A investment consulting services was awarded to Pension Consulting Alliance (PCA) LLC, and the Department of General Services approved the contract on April 25, 2017. The Board will receive an introduction from Eric White and Kay Ceserani, Managing Directors of PCA LLC.

Background

This will be a verbal report on Mr. White's and Ms. Ceserani's background and expertise in the 529 industry.