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**DECEMBER 9, 2014**

**AGENDA ITEM 3  
INFORMATION ITEM**

**SCHOLARSHARE INVESTMENT BOARD**

*Update from TIAA-CREF Tuition Financing, Inc.'s Field Consultant Team*

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***Background***

As part of its program management services for the ScholarShare College Savings Plan (Plan), TIAA-CREF Tuition Financing, Inc. (TFI) employs seven consultants stationed throughout the state. The consultants market the program through various efforts including employer outreach, one-on-one meetings with investors, workshops and webinars, and support for sponsored partner and community events and initiatives. All consultants are licensed professionals and two of the consultants are bilingual, Spanish-speaking.

During this agenda item, the consultants will provide an update on their professional background and the efforts they are currently executing to reach and educate Californians about the benefits of saving for college with the Plan.

Attached for reference are brief biographies and a map identifying the regional assignments of the field consultants.

***Presenters***

Pam McNulty, National Director, TIAA-CREF Tuition Financing, Inc.

Ralph Clement, Team Manager, TIAA-CREF Tuition Financing, Inc.



# SCHOLARSHARE

CALIFORNIA'S 529 COLLEGE SAVINGS PLAN

## Field Consultant Team



**Ralph Clement** is the team manager of the six ScholarShare field consultants located in California. Ralph has been in the finance business for over 25 years, 16 of them with TIAA-CREF. He enjoys spending time traveling around the state hiking and skiing. Ralph is an avid dog lover and loves exploring the northern coast while on walks with his dog. He also enjoys San Francisco's many culturally diverse neighborhoods, history and culinary delights.



**Yvette Meneses** has worked in the financial industry for over 13 years. She has been with TIAA-CREF for seven years, three of those spent as a ScholarShare bilingual tuition field consultant. She services primarily the LA/Pasadena/Santa Barbara areas. Yvette obtained her MBA, with a concentration in Management and Leadership in 2010 from the University of La Verne. On a personal note, she enjoys married life with her husband Shane, their son, Dante, and their boxer, Oso.



**Gianne Dashiell** comes to the organization with a breadth of experience. She services primarily Northern California, Sacramento, Fresno and on occasion the San Jose area. Her long and varied job history includes positions ranging from editor for a French-to-English translation agency in Paris to a seasonal holiday tug driver for UPS in Ontario. In her spare time, Gianne enjoys the company of her daughters, 17-year-old Gabrielle, 12-year-old Estella, and their new puppy, Costin Sanchez.



**Mike Diephouse** has spent the majority of his career in personal financial planning, specializing in stocks, bonds, mutual funds, as well as managed money, and insurance products. Mike also brings previous experience working with 529 college savings plans. He has been employed as a field consultant since November, 2011 and manages the OC and southern parts of LA. Mike's greatest impact has been with benefit fairs, professional associations, universities, and community events. He currently resides in Mission Viejo with his wife Karisa and their two sons, Derek and Conor. He enjoys spending time with his family, working out, playing golf, watching Yankees and Vikings football games, playing fantasy football, and working around his house.



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**Rafael Rivera** is based out of the San Diego area and is one of the team's two Spanish speaking bilingual field consultants. Born in Puerto Rico, Rafael attended Pacific Union College in the Napa Valley where he obtained his BA in International Business. Rafael has been in the industry for over 13 years and has been a ScholarShare field consultant since November 2011. In his free time, Rafael participates in motor sports, wind surfing and enjoys spending time with his wife and two young children.



**Jennifer Benson** has been in the financial services industry for over 10 years. She has extensive experience and knowledge from her time spent in a variety of positions, ranging from financial advisor to trainer/coach for new advisors. Jennifer has been a field consultant and employed by TIAA-CREF since late 2011 and primarily services San Francisco and the Bay area. In her spare time, Jennifer works with a local animal rescue group and is an avid bicycle enthusiast.



**Julianna Gobin** began working at TIAA-CREF with the pension field consultant group assisting clients with their retirement savings goals. Julianna is a native Californian and services primarily the Inland Empire. Prior to joining TIAA-CREF, Julianna worked for over six years with Schools First Federal Credit Union. She took a brief break during her credit union employment to relocate to London, England where she traveled and worked with a non-profit serving the needs of the community. In her spare time Julianna and her husband spend sleepless nights with their beautiful baby boy, Luka.



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