

**SAVINGS BOARD OF DIRECTORS MEETING**  
**May 20, 2026, 9 A.M.**  
**RSA Union Building, Suite 683, Montgomery, AL**

**Virtual Meeting Available**

<https://us02web.zoom.us/j/83457302737?pwd=Xvqkub5ek5eJekL9zlannLtaa0AZ9w.1>

Phone: 312-626-6799 Meeting ID: 834 5730 2737 Passcode: 230925

**AGENDA**

Call to Order  
Roll Call

Young Boozer  
Anita Kelley

**ACTION/DISCUSSION ITEMS**

- I. Approval of Meeting Minutes
- II. Alabama ABLE Savings Plan

A. Quarterly Reports

- 1. Vestwell Program Report
- 2. Callan Consultant's Report
- 3. Copperwing Marketing Report

Daniel Nzouankeu  
Annoesjka West & Paola Cardenales  
Lisa DeAraujo & Kristi Sasser

III. CollegeCounts 529

A. Quarterly Reports

- 1. Program and Marketing Report
- 2. Union Bank & Trust Plan Overview & Statistics
- 3. Wilshire Investment Performance
- 4. Callan Consultant's Report

Anita Kelley & Cari Kaup  
Cari Kaup & Jay Steinacher  
Rob Noe & John Nagle  
Annoesjka West & Paola Cardenales

B. Decision Item - Approval of Watch List Recommendations

Young Boozer

IV. Other Business

**Adjourn**

**Next Meeting: August 19, 2026, 9 A.M.**