



529

CollegeAdvantage

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Mike DeWine, Governor

Jim Tressel, Lt. Governor

Trisha Good, Executive Director

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# Memorandum

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**DATE:** Thursday, Oct. 30, 2025  
**TO:** ALL INTERESTED PARTIES  
**FROM:** Trisha Good, Executive Director *Trisha A. Good*  
**RE:** Public Meeting Notice

The Ohio Tuition Trust Authority Investment Board's *Executive Committee* will hold its regular meeting at 10 a.m. Thursday, November 13, 2025.

The Ohio Tuition Trust Authority Investment Board will hold its regular meeting at 10 a.m., Thursday, November 13, 2025, *or* immediately following the meeting of its *Executive Committee*.

Both meetings will be held in Room 1952, Riffe Center, 77 South High Street, Columbus, OH, 43215.

Members of the public wishing to attend the meeting must present a driver's license or other government issued photo ID at the security desk in the Riffe Center and undergo a security screening before access to the 19<sup>th</sup> floor will be granted.

For additional information, you may contact Amy Lyle at: [alyle@collegeadvantage.com](mailto:alyle@collegeadvantage.com).



# OTTA Regular Board Meeting Agenda

November 13, 2025

Review FY26 1<sup>st</sup> fiscal quarter ending 09/30/2025

Meeting Location: Riffe Center, 77 S. High St., 19<sup>th</sup> Fl., Rm. 1952, Columbus, OH 43215

TIME	ITEM
10:00 AM	Call to Order of Regular Board Meeting Roll Call Approval of Minutes from Regular Board Meeting on 08/14/2025 (VOTE)
10:05	Executive Director: agenda & meeting overview
10:10	Annual Presentations and Voting Items <ul style="list-style-type: none"> <li>AABP Asset Allocation – presentation and consent vote (FY26-01)</li> <li>Fifth Third – discussion and recommendation</li> </ul>
10:30	Executive Director Update <ul style="list-style-type: none"> <li>Agency update <ul style="list-style-type: none"> <li>529 Industry vs. Ohio’s 529</li> <li>Rating agency updates: Saving for College &amp; Morningstar</li> <li>Forward-looking priorities for next quarter</li> </ul> </li> <li>Quarterly financial update of CollegeAdvantage</li> <li>Legislative update <ul style="list-style-type: none"> <li>State proposed bills: HB 48 – Modify Income Tax Deductions for 529 &amp; ABLE Plans</li> </ul> </li> <li>Legal update <ul style="list-style-type: none"> <li>Annual Ethics training due by 12/31/2025</li> </ul> </li> <li>Other matters to bring before the board</li> </ul>
11:00	BlackRock Annual Presentation (virtual)
11:45	Wilshire: Quarterly Update <ul style="list-style-type: none"> <li>Variable Savings Plan Investment Update (including any watch items) <ul style="list-style-type: none"> <li>Direct Plan Performance; Fifth Third Rate Update</li> <li>BlackRock Advisor Plan Performance</li> </ul> </li> </ul>
12:15 PM	New Business from Board Members
12:25	Public Participation
12:30	Adjourn (VOTE)