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University Passport | Dr. Carolyn Sorkin | 860.503.3045
www.myuniversitypassport.com

CHESLA | www.CHESLA.org

SPEAKERS:

Patricia Roberts | 917.750.4832 | Patricia@GiftOfCollege.com
www.GiftOfCollege.com

Mark Greenstein | 860.530.6550 | msg@ivybound.net

Tom Martin | 860.218.2048 | Tom.Martin@vaylark.com
www.Vaylark.com

Jack Burke | 860.402.9173 | jburke@porterchester.com

Shannon Reynolds | 860.761.8484 | sreynolds@chesla.org



A NETWORKING AND INFORMATION SHARING CONFERENCE FOR GUIDANCE AND COUNSELING PROFESSIONALS

Working to Build Partnerships in the College Applications, Guidance,
Admissions, and Funding Process



Wednesday May 18, 2022
The Hartford Club
46 Prospect St, Hartford CT



May 18, 2022 | The Hartford Club
www.GuidanceSymposium.com

SESSIONS

8:30	Doors open, check in, coffee and networking, pick up swag bag	Main Ballroom
9:00	Welcome and Opening Comments	Main Ballroom
9:15 – 10:45	STEM Careers that Don't Require a 4 year Degree Jack Burke, Director High School Recruiting Porter and Chester Institute and YTI Career Institute	Main Ballroom
11:00 – 11:45	The Place of SAT's, AP's, and Grades in the Era of Test Optional College Admissions Mark Greenstein, Founder and Lead Instructor, Ivy Bound Test Prep	Breakout: Yacht Room
11:00 – 11:45	Five Biggest Mistakes College-Bound Families are Making and How School Counselors can 'Guide' Them to Success Tom Martin, Vaylark Financial Advisor	Breakout: Main Ballroom
11:30 – Noon	Meet and greet book signing with Author Patricia Roberts	



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Porter and Chester, a private sector, post-secondary technical institution with nine campuses throughout Connecticut and Massachusetts, featuring ten different career programs serving the skilled trades, transportation, healthcare, and technology industries by training its students in their chosen career.



Vaylark Financial Services is a boutique financial firm providing concierge levels of planning and consulting for families around the college funding process. Vaylark has supported thousands of Connecticut families since 1992 with offices in downtown Hartford.



University Passport works to provide students and families application strategies for college as well as prep school, academic summer programs, gap year and study abroad programs, and graduate school fellowships. Most important is helping clients find schools or programs that are a good fit with their academic and personal goals, and personal style.



Ivy Bound is a unique prep program that has helped thousands of students to improve test scores through full length practice tests, access to a personal prep expert, and exclusive access to key strategies from test creators and administrators.



CHESLA is a quasi-public state authority created to help student finance the cost of higher education.



Fidelity Investments has been selected as the new program and investment manager for the Connecticut Higher Education Trust (CHET) 529 college savings program



**Charles Wareham, Co-Founder Guidance Symposium,
Vaylark Financial Advisor**

Charles Wareham is considered one of New England's top authorities on college funding. He is a trusted advisor nationwide for school counselors seeking his expertise. Thousands of Connecticut families have found lasting value in his insights and college planning presentations. With 30 years' experience in the financial industry, Charles guides families, businesses and organizations in making smart financial decisions.



Patricia Roberts

Patricia Roberts has helped thousands of families avoid millions of dollars in student loan debt over the past 20+ years by sharing her expertise about planning ahead for higher education expenses with 529 plans. She is author of *Route 529: A Parent's Guide to Saving for College and Career Training with 529 Plans* and a go-to source for the media and others wanting to learn about these plans. She is Chief Operating Officer at Gift of College, Inc., where she helps employers reduce employee stress associated with the high cost of higher education by offering matching contributions to 529 college savings plans as a financial wellness benefit. She also educates employers on how they can offer tax free student loan assistance for employees and educates them as well about the valuable role 529 ABLE plans can play for employees with disabilities or those, like her, who have loved ones with a disability.



Mark Greenstein

Mark and his team of 30+ active tutors have been coaching SAT and ACT prep since 2001 to provide extra prep for college-bound students. Mark has taught test prep since 1987 and has been a speaker on college admissions, vouchers, choice in schools, and education reform. He is the publisher of the *Rising Stars' Heart of Darkness*, an annotated version of Conrad's novel, designed for SAT Prep. He has taught LSAT prep to over 1000 students, and SAT prep to over 800 and is on the

forefront of "sensibly scheduling your suburban students" ("ssyss"). Ivy Bound's SAT and ACT Prep courses have helped over 5000 students raise their scores, enhancing their college admissions and scholarships.



**Jack Burke, Director High School Recruiting, Porter
and Chester Institute**

Jack Burke is the Director of High School Recruiting at Porter and Chester Institute and YTI Career Institute at the 12 Campuses located in Connecticut, Massachusetts and Pennsylvania. Jack knows firsthand the importance of maintaining excellence and high standards while helping students find a good fit and their career options after graduation. Serving in several positions over 30 years including Executive Director/ Vice President, Corporate Director of Admissions/Marketing, Senior Career Program Specialist, Executive Committee and Board of Directors member has allowed Jack to exercise his leadership qualities and passion for education to benefit countless numbers of High School Graduates.



Tom Martin, Financial Advisor Vaylark Financial

Since 2016, Tom has devoted his career to working with college-bound families, helping make the most of school selection. He works with high school families to maximize financial aid, minimize student debt, and create an ideal college outcome for each student. Tom Martin serves as a board member for the Cheshire Education Foundation in his spare time. He oversees applications for local private scholarships and aids in approving mini-grant requests from teachers in the Cheshire Public School system. Tom's work and advice has been featured in Jim Cramer's *TheStreet.com*, *Business.com*, *Nerdwallet*, *Guidevine*, and *Discover*.



Brian Winman Regional Director Fidelity Investments

Brian Winman assists Fidelity Investments to offer financial professionals and institutions access to the investment, technology, and platform solutions they need to service their clients and grow their businesses. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals. In this role, Mr. Winman is responsible for the sale of Fidelity mutual fund products, exchange traded funds (ETFs), and 401(k) services through financial institutions, planners, wirehouses, and insurance firms in eastern Connecticut and western Massachusetts. Mr. Winman earned his bachelor of arts degree in business administration from the University of Rhode Island. He also holds the Financial Industry Regulatory Authority (FINRA) Series 6, 7, and 63 licenses.



Shannon Reynolds, Marketing and Outreach Specialist, CHESLA

Shannon Reynolds is the Marketing and Outreach Specialist for CHESLA, a quasi-public Connecticut state authority created in 1982 to help students and their families finance the cost of higher education. CHESLA’s programs include financial literacy, scholarships, and low fixed rate student loans. Mrs. Reynolds has a bachelor’s degree from Temple University and a master’s degree from Quinnipiac University. Mrs. Reynolds has been at CHESLA for over 3 years and is passionate about giving students and families all the resources they need to navigate the paying for college process. Mrs. Reynolds heads CHESLA’s Outreach Program, which speaks to high school students and families regarding the financial aid and paying for college process and is eager to be a resource for students and the people that support them.

Noon –
1:30

*Healthy Plated Lunch and
Keynote Presentation*

Main Ballroom

**Finding Purpose during the Pandemic:
Publishing “Route 529” to Help Parents
Prepare for College Costs with 529 Plans**

Patricia Roberts, Author, Chief Operating officer at Gift of College

1:45 –
2:30

**Understanding the Transition from
Harford Investments to Fidelity
Investments for the State of CT CHET 529**

Breakout
Yacht Room

Brian Winman, Regional Director Fidelity Investments

1:45 –
2:30

**What is CHESLA (Connecticut Higher
Education Loan Authority) and how they
can help CT families with college
planning and funding**

Breakout
Main Ballroom

Shannon Reynolds, CHESLA Marketing and Outreach Specialist

2:30

Networking and departure