Morgan Stanley Wealth Management

The Boston Center Group at Morgan Stanley

Please Register for a Webinar on:

529s and Education Planning

Please join our virtual Education Planning Webinar on **Wednesday, January 24th, 2024**, from **4-5 PM EST**. *William Bishop*, Vice President and 529 Relationship Manager at JP Morgan will share slides from the 2023 JP Morgan *College Planning Essentials* guide. We'll cover updates on tuition inflation and the cost of college, what to expect from financial aid and FAFSA changes, and tax and estate planning benefits of using a 529 plan, including newly expanded flexibility and SECURE 2.0 changes.

DATE & TIME
1/24/2024
4pm - 5pm EST

Register Here >

We hope that you can join us.

Speaker Information

William Bishop

Vice President
529 Relationship Manager

Speaker:
William Bishop
JP Morgan

William D. Bishop, *Vice President*, serves as the Relationship Manager of Nevada's Future Path 529 Plan for J.P. Morgan Asset Management. An employee since 2016, Will collaborates with our sales distribution channels, traveling throughout the country to educate clients and advisors on JPMorgan's Educational Savings capabilities and 529 products, using College Planning Essentials. Previously, Will was an Internal Client Advisor for five years within JPMAM, cultivating relationships with wealth management financial advisors. He started his career in Client Service, partnering with U.S Funds Advisors and clients in the NY 529 Advisor Guided Plan to service client accounts and educate on the importance of college savings. Will holds a B.S. in finance and economics from the University of Dayton and holds the Series 7 and 63 licenses. He holds his CIMA certification.

[Signature of Primary Contact]