



PROFESSIONAL CERTIFICATION COALITION

Agenda PCC Member Strategy Call Thursday, July 24, 2025 12:00 pm ET

Steering Committee: I.C.E. (Denise Roosendaal), ASAE (Mary Kate Cunningham, Kyle Hayes)
Legal Counsel: Jerry Jacobs, Craig Saperstein, Julia Judish, Lori Panosyan, Laura Killalea, Jaria Martin (Pillsbury)

I. Welcome/Membership Updates

- a. Invoices for FY 2025-2026
- b. [Summary of Seventh Year Accomplishments & Prospectus](#)
- c. PCC Website Password Change
 - i) As we do every year, we will be changing the password for the “For Members” section of the PCC website, which has a large repository of information that we only share with our members.
 - ii) Effective September 15, 2025, we will use a new password. Members who have paid all or part of their dues for this fiscal year (or members who indicate to us that their dues are coming) will receive the new password.

II. Federal Legislative Activity and Guest Presentation:

- a. *Implementation of the Freedom to Invest in Tomorrow’s Workforce Act – Leslie Crudele, Director of Government Relations at Commonwealth Savers (formerly Virginia529)*
 - i) The recent passage of the *Freedom to Invest* legislation as part of the “One Big Beautiful Bill” is a major win for the certification industry and the legislation takes effect immediately.
 - ii) With national reach, a strong marketing and outreach team, and a focus on

meeting people where they are, Commonwealth Savers expects significant success in implementation.

(1) Marketing efforts will aim to expand beyond traditional college savers to include chambers of commerce, trade associations, and other organizations that promote nontraditional career pathways, emphasizing flexibility for families to plan and use 529 accounts beyond four-year college degrees.

iii) Automatic conformity is a strategic priority—there’s an opportunity to engage with individual state treasurers, chambers of commerce, and the National Association of State Treasurers to address workforce alignment and promote legislative updates.

(1) States that do not automatically conform may need to go through their legislatures, potentially delaying implementation by certain state 529 plans.

iv) Even if states need time to adapt, rollovers for 529 plans are possible across state lines, supporting national implementation.

v) For those pursuing professional credentials, individuals should research if the expense qualifies and consult their plan provider or the issuing organization, as timelines and processes differ by state.

vi) Individuals can withdraw 529 funds for qualified expenses and reimburse themselves, even if the plan was not set up in advance; in Virginia, this is permitted, but rules vary by state.

(1) Customers must keep receipts for expenses, though documentation is

not required upfront.

(2) If necessary, individuals should consult a tax professional.

vii) 529 plan administrators provide resources but do not determine eligibility for expenses, which are defined by state law.

(1) For more information regarding qualified expenses, please visit: [What](#)

[529 Plans Cover | Qualified Expenses | Invest529](#)

b. *Enactment of the Freedom to Invest in Tomorrow's Workforce Act*

i) Last year, the bill was marked up last year in the Ways and Means Committee with 150 co-sponsors. This year, we achieved the support of 200 cosponsors, which made a compelling case for the bill's inclusion in the OBBB.

ii) Though the OBBB is designed as a partisan Republican bill, the *Freedom to Invest Act* is among the most bipartisan provisions in the package, expanding access to career savings plans. We aim to build on this momentum with greater Hill engagement and swift implementation to benefit the PCC.

iii) We cannot guarantee how the IRS will implement the provision, especially given staffing cuts and transitions.

iv) However, we expect the IRS to issue guidance in the form of a revenue procedure, rather than a formal rulemaking, to clarify which credentials will qualify.

(1) There likely will not be a request for public information, so organizations should proactively share their implementation views with the IRS.

(2) Given the IRS's current workload under the OBBB, formal guidance could take up to a year.

v) The PCC can play a role in educating the IRS by sending a letter to leadership highlighting the provision's importance and recommending implementation approaches.

(1) It will also be important to highlight the catchall provision that exists,

outlining that many legitimate programs could still qualify even if not formally recognized.

- vi) Organizations can reach out directly to accrediting bodies to seek recognition, rather than waiting for IRS action, given that accredited credentials are specifically deemed to be qualifying expenses under the bill.
- vii) A forthcoming FAQ on 529 plans will help clarify eligibility and offer guidance on proactive steps for becoming qualified.

III. Federal Legislative Activity

- a. The House and Senate are currently considering the National Defense Authorization Act (NDAA) and FY2026 Defense Appropriations legislation.
- b. Servicemember credentialing benefits, including COOL benefits, are under review; the House version of the NDAA does not appear to propose changes to benefit levels. The Senate’s view on this issue remains undetermined at present.

IV. State Legislative Activity

- a. New 2025 watchlist on the “For Members” portion of the PCC website.
- b. Total number of high priority state bills this session that are now dead: 24
- c. Other high priority legislation:
 - i) In Texas, HB 5629/SB 2255 was signed into law. As previously explained, this bill creates a bypass for regular licensing requirements.
 - ii) In Massachusetts, H 420/S 198 would block agencies from investigating fraud and impose a “clear and convincing” evidentiary standard.

State	Bill Number	Category	Last Movement	Status
MA	H 420/S 198	Returning Citizens	7/17/2025	In first chamber
TX	HB 5629/SB 2255	Alt. Pathways	6/20/2025	Enacted

V. Questions