



Society for Financial Education and Professional Development, Inc.

Enhancing financial and professional growth...

12th Annual Financial Literacy Leadership Conference Workshops

- **Technology and Financial Literacy Applications**

This workshop will include the presentation of new and innovative ways to use today's technology to provide effective financial literacy training to individuals. The panelists will discuss the key components of their successful applications, and the strategies for distribution and use for targeted audiences.

- **Multimedia Financial Applications**

This dynamic workshop will cover how financial literacy is being inserted into multimedia sources found in everyday living environments. For example, panelists will teach how multimedia is used successfully to tell a story that would influence one's financial decision-making. These formats include video, audio, graphics, texts and software. Experts will demonstrate how key personal money concepts can be utilized in financial literacy presentations.

- **Stress and Financial Decision-Making**

The links between stress and money are complex. Research shows that stress can drive bad financial decisions. According to the American Psychological Association's Stress in America Report, money is a significant source of stress in the lives of three out of four Americans. Chronic financial stress is associated with serious psychological, occupational, relationship and health problems. Stress can also drive unwise financial decisions leading to depression, abandoning routine tasks and avoiding financial decision-making altogether. In this session, experts will provide insights and practical solutions to help us better understand and

address the interplay of stress, financial worries and behavior, and unwise financial decisions.

- **Peer-to-Peer Financial Education**

The panelists of this workshop, including students from SFE&PD's Student Ambassador Program, will share successful peer-to-peer financial education models that are being utilized at colleges and universities. They will share how financial literacy training is infused in curricula and strategies to ensure the effectiveness of student-centered educational programs. Panelists will also demonstrate models for peer-to-peer financial literacy training.

- **Improving Financial Capability for People with Disabilities**

This workshop will address the needs of the disabled and present the benefits available to help them maintain financial sustainability. We will take a special look at the disability benefits for veterans and how to access these benefits. Important resources from the Social Security Administration and Veterans Administration will be presented. The new "*Achieving Better Experience Accounts*" will be introduced during this workshop.

- **Global Perspective on Financial Literacy Applications**

The financial literacy movement has expanded around the globe. This keynote special session will look at financial literacy programs designed to meet the financial knowledge and cultural needs of diverse countries, with a specific focus on financial education programs in China.

- **Infusion of Financial Education in Faith-based Training**

Theology schools and seminaries are increasingly infusing financial literacy into the education of seminarians. Classes and workshops are the primary means to increase the financial and stewardship knowledge of divinity students. The goal is to teach seminarians practical money management concepts and leadership skills to enable them to counsel their congregations on financial matters. Panelists will present models for teaching financial literacy to seminarians and methods to improve the use of financial resources.

- **Community Banks and Financial Literacy**

Over the years, community banks have played a strong role in helping individuals in local communities to improve their financial well-being. This critical action has encouraged economic empowerment and growth in their respective communities. Representatives of community banks will discuss their financial literacy programs and potential partnerships that can be established to maximize the economic impact of their financial programs.

- **Financial Knowledge for the Elderly**

Financial missteps can be costly, and it can take individuals years to recover from financial mistakes. Moreover, these missteps can create legal ramifications that are often expensive to resolve. This workshop will look at steps to take to ensure that appropriate financial decisions are made and provide solutions used to correct existing financial mistakes.

- **Minimizing and Liquidation of Student Loan Debt**

College student loans helped to pave the way for a college education for generations of Americans to achieve financial and economic security. However, these loans can often limit the ability of many college graduates to attain economic security due to this debt, which hampers financial sustainability. In many families, the burden of student debt has become intergenerational. Panelists will address this issue, discuss ways to limit student loan indebtedness and how to liquidate this debt. The results of a survey on the role Americans 50-plus play in helping others pay for college will be shared.

- **What Every Millennial and Every Gen Z Should Know**

Learn how Millennials and Gen Z are advancing financial literacy through social media and new forms of communication. This session will focus on how to reach the young adults and engage their interest in learning skills that encourage lifelong financial well-being. Panelists will share their techniques and tactics to reach younger demographics and highlight successful models and role play.

- **Do You Need a Financial Coach?**

Many of us have the financial resources to maintain our financial well-being and create wealth but need guidance. The panelists for this workshop will help you answer the question of how to achieve your financial goals. Certified financial coaches will share the goals and methodologies of financial coaching and potential outcomes and/or next steps.

- **Financial Missteps and Solutions**

Financial missteps can be costly, and it can take individuals years to recover from financial mistakes. Moreover, these missteps can create legal ramifications that are often expensive to resolve. This workshop will look at steps to take to ensure that appropriate financial decisions are made and provide solutions used to correct existing financial mistakes.

- **Innovative Native American Financial Education Programs**

This workshop will cover the innovative programs developed to help Native Americans to acquire financial assets and to create wealth. The purpose of these programs is to assist in the establishment of permanent institutions and programs that will contribute to economic independence and strengthen sovereignty for Native American communities. The panelists will walk through the steps to accomplish these financial goals and objectives.

- **Strategies for Managing Financial Matters during a Natural Disaster (Tools and Resources)**

Each year the impact of severe weather has a negative effect on the lives on thousands of individuals and households across the United States. These events have caused loss of property, relocations, loss of jobs, and death. Natural disasters have taken a toll on the financial well-being of many Americans. Moreover, a significant number of people must restart their lives from the ground up. The panelist of this workshop will discuss ways to prepare for natural disasters as well as identify resources to help individuals and families reestablish their households. Documents that each individual or households should have available to acquire assistance from Federal and state agencies will be provided.

- **Winning Tax Strategies: The Tax and Jobs Act of 2017**

The Tax and Jobs Act of 2017 created anxiety among many 501(c)(3) nonprofit organizations related to its impact on charitable contributions. The panelists will discuss strategies that nonprofit organizations can use to insure funding from individual donors. Tax strategies associated with student loan interest will be discussed.

