11th Annual Financial Literacy Leadership Conference

Wealth: Paying Your Way Forward

AGENDA

Thursday, September 13, 2018

7:45 a.m. - 8:30 a.m.
CONFERENCE REGISTRATION
Room: Prefunction Foyer
Continental Breakfast

8:30 a.m. – 8:45 a.m.
CONFERENCE WELCOME & OVERVIEW
Room: Ile de France Ballroom

Theodore R. Daniels, *Founder & President*
Society for Financial Education & ProfessionalDevelopment, Inc.

8:45 a.m. – 9:15 a.m.
INTRODUCTION OF KEYNOTE SPEAKER

KEYNOTE SPEAKER
Syble Solomon
President
LifeWise Strategies / Money Habitudes

9:30 a.m. – 10:45 a.m.
WORKSHOP I:
LIFE PRINCIPLES – YOUR GPS
Room: Conde/Frontenac

The influence of our mindsets, beliefs, attitudes, and behaviors can lead us to make financial choices that prevent us from achieving our desired intentions. The relationship between life principles and financial practices should be aligned to ensure financial and economic well-being. This workshop will cover key life principles and the psychology of managing financial resources that can serve as your lifetime GPS. An interactive simulation on what drives financial behavior will also be presented.

- Sylbe Solomon, President, LifeWise Strategies / Money Habitudes
- Daphne Wright, CFP, CPA, Economic Life Coach, STRIDES Life Enrichment Concepts, LLC
- Tahira Hira, Ph.D**.**, Professor Emertia, Iowa State University – Moderator

WORKSHOP II:
Wealth Untapped or Unrealized Wealth
Room: Maurepas

Let's assume your parent or relative dies without a last will and testament, leaving you as sole heir or as a joint *heir* with other relatives of owned property. Every state, and the District of Columbia, has specific laws that determine who inherits property when someone dies without a will. The panelists of this workshop will discuss the states where large sums of heir property are not being tapped or realized. The panelists will provide the steps to take to acquire property that belongs to you. The moderator of the workshop will also share steps on how to acquire unclaimed tax refunds held by states.

- Conner Bailey, Ph.D., Professor Emeritus of Rural Sociology, Auburn University
- Gerren K. Sias, MPA, Outreach Coordinator, Louisiana Appleseed
- Laura Tuggle, Executive Director, Southeast La. Legal Services
- Len Foxwell – Moderator

10:45 a.m. – 11:00 a.m.
BREAK
Room: Grand Ballroom Foyer

11:00 a.m. – 12:15 p.m.
WORKSHOP III:
LIFE STAGES: FINANCIAL PLANNING
Room: Conde/Frontenac

All of us want financial resources to live a comfortable life at each stage of our lives. Americans want to be able to purchase the items and services they desire, and to accumulate savings for unexpected expenses, retirement, and leisure activities. This workshop covers key personal money management concepts that individuals need to understand at each life stage. These concepts include: credit and debt management, developing and use of a budget to control expenses, establishing financial short-term, intermediate, and long-term goals, risk management and more.

- Bria Clark, Founder of BRIALife
- Dywane Hall

WORKSHOP IV:
ADULTS AND YOUNG ADULTS FINANCIAL EDUCATION RESOURCES
Room: Maurepas

Panelists will present financial education resources that educators can use to increase the financial knowledge of adults and young adults. The panelists will present interactive and online resources, along with original publications available to teach these age groups. The materials presented will include teacher and student editions of innovative financial education curricula.

- Heather Brown, Financial Education Impact Specialist, Bureau of Consumer Financial Protection
- Melanie Mortimer, President, SIFMA Foundation

- Bonnie Wallace, Channel Manager, Hands on Banking, Wells Fargo
- Dr. Joe Ricks, Jr., Chair, Division of Business, Xavier University of Louisiana – Moderator

12:15 p.m. – 1:30 p.m.
LUNCHEON
Room: Ile de France Ballroom

INTRODUCTION OF LUNCHEON SPEAKER

LUNCHEON SPEAKER

Billy J Hensley, PhD
President & CEO
National Endowment for Financial Education

1:45 p.m. – 3:00 p.m.
WORKSHOP V:
CREATING WEALTH THROUGH HOMEOWNERSHIP
Room: Maurepas

Homeownership is the primary way that most Americans acquire wealth. A recent study revealed that homeowners who sold their homes over the past year realized on average a 30% profit. Panelists will provide a detailed discussion on the home buying process and practical information that can be used to acquire a home. The workshop will also highlight key points from the "Know Before You Owe: Mortgage Shopping Study."

- Nicole Shea, New Media Specialist, Bureau of Consumer Financial Protection
- Matt Ribe, General Counsel, National Foundation for Credit Counseling
- Stacey Walker, Director, Housing Outreach, Freddie Mac
- Joe Beeson – Home Mortgage Consultant, Moderator

WORKSHOP VI:
ROLE PLAY AND MONEY MANAGEMENT
Room: Conde/Frontenac

This interactive workshop will feature several role-playing scenarios related to money management. Topics to be covered include: decision making about whether to file for bankruptcy, choosing an executor of a will, debt consolidation, use of retirement savings to purchase a personal use item and much more. The moderator will establish breakout groups to discuss these case studies. Financial advisors will provide advice on how to address the issues presented.

- Dawn Doebler, CPA, CFP® , CDFA®, Senior Wealth Advisor, The Colony Group
- Daphne Wright, CPA, CFP® Certified Public Accountant, Certified Financial Planner ™ Professional, Wright & Associates, CPA, PLLC
- Sonya Smith-Valentine, President, Financially Fierce, LLC - Moderator

3:00 p.m. – 3:15 p.m.
BREAK

3:15 p.m. – 4:30 p.m.
WORKSHOP VII:
FLAGS OF FRAUD AND INVESTOR PROTECTION
Room: Maurepas

Do you know a "con artist" when you see one? The panel of experts will share a "con artist" tool kit to help protect your financial resources from these individuals and organizations. Real life case studies where individuals and organizations, including churches, lost their financial resources to con artists will be presented. The workshop will include an interactive simulation to help identify "con artists." The panelists will also discuss investor protection laws and regulations to protect investments.

- Nancy Boudreaux, Training Program Manager, Louisiana Office of Financial Institutions (OFI)
- Chrisine Kieffer, Senior Director, FINRA Investor Education Foundation
- Igwe E. Udeh, Ph.D., Dean & Professor, College of Business, Southern University of New Orleans

WORKSHOP VIII:
HISPANIC FINANCIAL EDUCATION OUTREACH
Room: Conde/Frontenac

A great need exists to meet the financial education concerns of all demographics in our society. This workshop will focus on issues that financial educators should be aware of pertaining to outreach approaches and the delivery of financial education resources to the Hispanic community. The panelists of this workshop will discuss cultural relevancy and successful approaches to meet the financial education needs of the Hispanic population.

- Olga Cmargo, Chief Executive Officer & Founder, FARO Associates, LLC
- Linda Gabriel, Community Affairs Specialist, FDIC
- Alfred Ramirez, Owner/Principal Consultant, Diverse Strategies
- Carolina Valderrama, Affordable Lending & Housing Outreach Senior, Freddie Mac

6:00 p.m. – 7:30 p.m.
SFE&PD RECEPTION
Xavier University of Louisiana
University Center Ballroom B1
(Shuttle Buses will depart from the JW Marriott Hotel at 5:30 p.m.)

Co-Sponsored by:

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FRIDAY, SEPTEMBER 14

8:00 a.m. - 8:30 a.m.
CONFERENCE REGISTRATION
Room: Prefunction Foyer
Continental Breakfast

8:30 a.m. – 9:00 a.m.
GENERAL ASSEMBLY
Room: Ile de France Ballroom

A CONVERSATION WITH RAY BOSHARA
Join us for a conversation with Ted Daniels and Ray Boshara, the senior advisor and director of the Center for Household Financial Stability at the Federal Reserve Bank of St. Louis.

9:15 a.m. – 10:15 a.m.
WORKSHOP IX: FAMILY FINANCIAL THERAPY
Room: Conde/Frontenac

This workshop will cover how personal financial knowledge, attitudes, and behaviors can have a positive and/or negative affect on personal and family financial well-being. The workshop will examine the issues of financial avoidance and emotional distress. Panelists will discuss how these issues can be addressed to ensure family financial growth. The panelists will also look at how a culture focused on materialism affects a family's financial stability.

- Jeannette Bennett, Senior Economic Education Specialist, Federal Reserve Bank of St. Louis—Memphis Branch
- Ed Coambs, MBA, MA, CFP®, LMFTA, Carolinas Couples Counseling
- Kristy L. Archuleta, Ph.D., LMFTEditor, Journal of Financial Therapy
  Associate Professor, Financial Planning, Housing & Consumer Economics
  College of Family & Consumer Sciences, University of Georgia

WORKSHOP X:
FINANCIAL RESILIENCE STRATEGIES
Room: Maurepas

Each day we are confronted with financial decisions and financial challenges related to our livelihood. Challenges can include income volatility, short-term dislocation of employment, divorce, unexpected illnesses and more. The panelists for this workshop will share information on how to take a holistic approach to managing financial resources. The use of programs and tools to ensure financial resilience during life changes, which can impact your financial well-being, will also be discussed.

- MeShea Rolling Brooks, Franchise Owner/Operator, EventPrep, Inc.
- Amy L. Hinojosa, President and CEO, MANA, A National Latina Organization
- Kathy Stokes, Senior Advisor, AARP
- Carol Urton**,** Director, Corporate Responsibility & Sustainability, Experian, North America
- Marguerita Cheng, Chief Executive Officer, Blue Ocean Global Wealth – Moderator

10:15 a.m. – 10:30 a.m.
BREAK

10:30 a.m. – 11:45 a.m.
WORKSHOP XI:
KIDDYNOMICS – PREPARING THE NEXT GENERATION
Room: Conde/Frontenac

This workshop will introduce conference attendees to an economics curriculum designed to encourage young children to start thinking about finances and economics throughout their school years and beyond. A game that can be used to determine college financial readiness will be presented. Kid entrepreneurship is a hot topic. This workshop will include an expert who will discuss how to help kids create and manage money as young entrepreneurs.

- Jatali Bellanton
- NashilaSomani-Ladha
- Mary C. Suiter, Assistant Vice President and Economic Education Officer, Federal Reserve Bank of St. Louis
- Susan Bistrainsin, Teacher Advisor, SFE&PD – Moderator

WORKSHOP XII:
LIFE STAGES: INVESTMENT STRATEGIES
Room: Maurepas

This workshop will cover how to use investment vehicles and strategies that can be used at each life stage to growth wealth and financial stability. Panelists will discuss retirement savings plans, such as 401(k), 403(b) and Individual Retirement Accountants, as well as college savings plans.A presentation of resources to gain new investment knowledge will be included.

- Marcus Creighton
- Ritta McLaughlin, Chief Education, MSRB
- Thomas Maganello, Senior Counsel, Securities and Exchange Commission Office of Investor Education and Advocacy
- Mark T. Brookshire, President and CEO, Stock-Trak, Inc.

11:45 a.m. – 12:15 a.m.
LUNCHEON BREAK
Room: Ile De France Ballroom

12:15 p.m. – 1:30 p.m.
WORKSHOP XIII:
THE GENDER INVESTMENT GAP
Room: Conde/Frontenac

It is well documented that women generally tend to be more risk-averse in respect to investing in comparison to men. As a result, women often accumulate retirement savings at lower rate than men. This workshop will discuss why this situation exists and how it should be addressed, particularly as women have longer lifespans than men. Panelists will also present investment strategies that women can use as a basis to generate future wealth and income.

- Dawn Doebler, CPA, CFP® , CDFA®, Senior Wealth Advisor, The Colony Group
- Gary Mottola, Research, National Financial Capability Study, FINRA
- Dr. Katherine Sauer, Senior Director of Education, Research and Strategic Impact at NEFE

WORKSHOP XIV:
Financial Ecosystem
Room: Maurepas

This workshop will include panelists who will outline how the American financial system works. Specifically, the workshop will focus on how financial institutions are interlinked with each other to provide products and services to their customers. This workshop will include information on how financial institutions maintain liquidity, generate deposits to make loans, and more. A presentation on “Fintech,” a term used to refer to innovation in financial services, will be showcased to see if these innovations could benefit you or your organization.

- Deborah Owens, WealthyU
- Demetrius Scott, Associate Manager, Corporate Citizenship, Ally Financial – Moderator

1:45 p.m. – 3:00 p.m.
WORKSHOP XV:
ECONOMIC CYCLES AND FINANCIAL DECISION-MAKING
Room: Conde/Frontenac

The road to economic security is discovered by increasing one's knowledge of America's economic cycles. This knowledge is the key to financial growth and sustainability. This workshop will cover how the Federal government's fiscal policy and Federal Reserve Board's monetary policy impact the American economy and individualfinancial decision-making. Learn how these policies work and affect your financial decision-making, and when to use financial advisors to help you with financial decisions.

- Theodore R. Daniels, Founder & President, Society for Financial Education & Professional Development, Inc.
- Danielle Winchester, Ph.D., Professor, Finance, North Carolina A&T State University

WORKSHOP XVI:
FINANCIAL MANAGEMENT FOR NONPROFIT BOARDS
Room: Maurepas

This interactive workshop will provide a practical understanding of the unique organizational needs of nonprofits, in relation to financial management systems, function, reporting and analysis. Discover why financial management is an important tool for nonprofit board members and explore recommended governance practices to strengthen your nonprofit's fundraising efforts.

- Krista Berry Ortega, MS, Director, Sanford Institute of Philanthropy

3:00 p.m. – 3:15 p.m.
TAKEAWAYS AND CLOSING REMARKS
Room: Ile De France Ballroom

Theodore R. Daniels, *Founder & President,*
Society for Financial Education & ProfessionalDevelopment, Inc.