



Society for Financial Education and Professional Development, Inc.
Enhancing financial and professional growth ...

13th Annual Financial Literacy Leadership Conference Agenda
Theme: Financial Strategies and Economic Disparities
A Virtual Event

TUESDAY, NOVEMBER 9, 2021

9:00 a.m. – 9:10 a.m.

CONFERENCE WELCOME & OVERVIEW

Theodore R. Daniels, Founder & President, Society for Financial Education and Professional Development

Michael Pugh, President & CEO, Carver Bank; Chair, Board of Directors, Society for Financial Education and Professional Development

9:10 a.m. – 9:55 a.m.

INTRODUCTION OF KEYNOTE SPEAKER

Bonnie Wallace, Head of Financial Health Philanthropy, Wells Fargo

KEYNOTE SPEAKER

THE KEYS TO WEALTH CREATION

Dr. Pamela Jolly, CEO, Torch Enterprises; Creator of TheNarrowRoad™

10:00 a.m. – 11:15 a.m.

WORKSHOP I:

SUCCESSFUL MONEY MANAGEMENT STRATEGIES FOR COLLEGE STUDENTS AND FINANCIAL COLLEGE COSTS

The panelists of this workshop will share important money management strategies related to the successful completion of college. There will also be a discussion on how 529 College Savings Plans can be used to accumulate funds for college that are tax-free, and strategies for the acquisition of scholarships and grants to cover college costs.

Mary Morris, CEO, Virginia529

Jacqueline Miller, Former Student Ambassador, Society for Financial Education and Professional Development

Gene Natali, Co-Founder & CEO, Troutwood

Rita Cheng, CFP[®], CEO, Blue Ocean Global Wealth; Financial Educator, Society for Financial Education and Professional Development – Moderator

WORKSHOP II:

MENTAL HEALTH AND THE FINANCIAL ADVICE RELATIONSHIP

Mental health is a matter of increasing public concern. In this workshop, attendees will learn strategies directly from our subject-matter experts on how to work with individuals and investors experiencing mental health challenges and how to maintain balance and set boundaries. The panelists will answer the following questions:

- How investors and individuals' mental health challenges are adversely affecting their financial decision-making abilities
- How the pandemic and isolation are adding extra layers of anxiety and complicate the financial advice relationship
- How family influence affects decision-making, leaving some investors vulnerable to financial abuse and exploitation

Carol Lynde, President & CEO, Bridgehouse Asset Managers

Adam Wiseman, Mental Health Subject-Matter Expert, Bridgehouse Asset Managers Advisory Panel

Lynne Kelly, Ph.D., Associate Professor, Department of Finance and International Business, School of Business, Howard University – Moderator

11:30 a.m. – 12:25 p.m.

WORKSHOP III:

STRATEGIES FOR TEACHING TO MEET FINANCIAL LITERACY STANDARDS

In this workshop, experts share information about the Federal Reserve of St. Louis's guide: *A "Standard" Personal Finance Curriculum*, which is a curriculum designed as a high school personal finance course. It focuses on decision-making across the spectrum of financial literacy topics. There is also a presentation of multigenerational financial literacy programs and FinTech financial education programs.

Jeannette N. Bennett, Senior Economic Education Specialist, Federal Reserve Bank of St. Louis-Memphis Branch

Mac Gardner, CFP[®], Founder & Chief Education Officer, FinLit Tech

Luke W. Reynolds, Chief, Outreach and Program Development, Federal Deposit Corporation

Susan Bistransin, Financial Education and Empowerment Coordinator, Prince George's County, Maryland; Teacher Advisory Council, Society for Financial Education and Professional Development – Moderator

WORKSHOP IV:

PROMOTING CAREERS IN ECONOMICS, FINANCE, AND BANKING

In this workshop, thought leaders will share information on programs, initiatives, curricula, and partnerships designed for diversity and inclusion, and how to improve the pipeline to careers in economics, finance, and banking for women and underrepresented minorities in the financial services industry.

Karim Hill, MBA, Executive Director, The American College Center for Economic Empowerment and Equality, The American College of Financial Services

Anthony Nelson, Ph.D., Dean, School of Business, North Carolina Central University

Mary Suiter, Ph.D., Assistant Vice President, Federal Reserve Bank of St. Louis

Linda Brenner, Senior Director, Industry Operations and Diversity & Inclusion, Investment Company Institute – Moderator

12:30 p.m. – 1:00 p.m.

LUNCHEON

INTRODUCTION OF LUNCHEON SPEAKER

Theodore R. Daniels, Founder & President, Society for Financial Education and Professional Development

LUNCHEON SPEAKER

FINANCIAL INCLUSION

John Moses, Deputy Director, Office of Investor Education and Advocacy, Securities and Exchange Commission

1:05 p.m. – 2:25 p.m.

WORKSHOP V:

SUCCESSFULLY MANAGING PERSONAL FINANCES IN THE "NEW NORMAL"

The COVID-19 pandemic continues to impact the personal finances of households throughout the United States. This is amplified by a record number of individuals who are experiencing unemployment, unexpected health issues, divorces, deaths, and dramatic changes in the operations of industries. Financial advisors will share their experiences in working with individuals and households whose personal finances have been adversely impacted by the pandemic. The panelists will also provide guidance to conference attendees on how to manage their personal finances in this new environment in which we live.

Lee Baker, CFP[®], President, Apex Financial Services

Dawn Doebler, Principal & Senior Wealth Advisor, The Colony Group
Daphne Wright, CPA, CFP®, Wright & Associates, CPA, PLLC;
Financial Educator, Society for Financial Education and Professional
Development
Stephen T. Peoples, Jr., MSA, Accounting Professor, College of
Business & Economics, North Carolina A&T State University –
Moderator

WORKSHOP VI:

CREDIT DATA SUPPRESSION/DELETION MEASURES

In this session, conference participants will hear from financial educators and authors of the recently released study of "Why Addition is Better than Subtraction: Measuring Impacts from System-Wide Deletion and Suppression of Derogatory Data in Credit Reporting." The study simulates the impacts of large-scale suppression and deletion of negative credit information proposed in the drafted COVID-19 response legislation, which offers an alternative approach to protect consumers.

William “Bill” Cheeks, CEO, Abba Associates Inc.
Dara Duguay, COO, Credit Builders Alliance
Patrick Walker, Director of Research, Policy and Economic Research
Council (PERC)
Michael Turner, Ph.D., President & CEO, Policy and Economic
Research Council (PERC) – Moderator

2:25 p.m. – 3:00 p.m.

NETWORKING/EXHIBITOR HALL

3:00 p.m. – 4:15 p.m.

WORKSHOP VII:

WHAT REPARATIONS WOULD LOOK LIKE IN SUPPORT OF LOW-INCOME HOUSEHOLDS

Economic reparation for Black Americans continues to be a topic discussed in the news, in communities, and across all levels of government. This workshop will include a discussion by leaders at the national and local level who are taking steps to address or redress serious violations of human rights or humanitarian law through reparations in the form of compensation to victims of these violations or laws. There will also be a discussion of a pilot program to address the needs of the “working poor” or low-income households.

Daniel Biss, Mayor of Evanston, Illinois
Ron Daniels, Ph.D., President, National Institute of the Black World 21st
Century
Ebonee Davis, Associate for Programming and Historical Research for
Reparations, Virginia Theological Seminary

Kate Garvey, Director, Alexandria Department of Community and Human Services

Cheryl J. Sanders, Ph.D., Professor, Howard University School of Divinity; Senior Pastor, Third Street Church of God – Moderator

4:15 p.m. – 5:00 p.m.

NETWORKING/EXHIBITOR HALL

WEDNESDAY, NOVEMBER 10, 2021

9:00 a.m. – 9:45 a.m.

INTRODUCTION OF KEYNOTE SPEAKERS

Brianna Alexander, Manager of Employee Giving, Ally

A KEYNOTE CONVERSATION

RACIAL, GENDER, GENERATIONAL, EDUCATIONAL AND WEALTH GAPS: ECONOMIC DISPARITIES IN AMERICA

This conversation will examine the latest Federal Reserve data on the Black-White wealth gap, with a particular focus on minority investor inclusion. There will be a breakdown of the household balance sheet, which will highlight areas where there are the greatest ownership and debt gaps between Black and White Americans. The workshop will offer specific ideas for achieving greater minority investor inclusion. There will also be a discussion of ways to fix the widening wealth gap in the United States.

Ray Boshara, Senior Advisor, Federal Reserve Bank of St. Louis

Rodney Brooks, Founder, Rodney A. Brooks, LLC; Author, Fixing the Racial Wealth Gap

Theodore R. Daniels, Founder & President, Society for Financial Education and Professional Development, Inc. – Moderator

9:45 a.m. – 11:00 a.m.

WORKSHOP VIII:

FINANCIAL WELL-BEING TOOLKIT AND FINANCIAL EMPATHY

This workshop will include a presentation on a financial well-being toolkit, based on the Inclusive Financial Well-being and Empowerment Model, which attendees can use to improve their relationship with money. The workshop will also include information on self-compassion as a pathway to providing financial empathy to energize economic empowerment.

Leah Davis, Founder, Leah Davis Coaching

Timi Jorgensen, Ph.D., Director of Financial Education & Wellbeing, The American College of Financial Services

Tammy McNeil, Assistant Professor, Department of Business, Economics, and Entrepreneurship, Bennett College – Moderator

WORKSHOP IX:

FINANCIAL STRATEGIES AND RESOURCES DURING THE COVID-19 PANDEMIC

The years 2020 and 2021 have brought enormous financial and economic challenges to individuals and households in the United States. The panelists and moderator of this workshop will share financial strategies that individuals and households can use to limit the impact of financial challenges they face and will offer resources available to help address existing economic hardships.

Heather Brown, Ed.D., PMP, SPHR, Financial Education & Impact Analyst/CFPB FinEx Program Lead, Consumer Education & Engagement, Office of Financial Education, Consumer Financial Protection Bureau

Marcus Creighton, Vice President, Wealth Protection Advisors, LLC; Financial Educator, Society for Financial Education and Professional Development

Evan Johnson, Howard University, Student Ambassador, Society for Financial Education and Professional Development

Betangabeh Khumbah, Howard University, Student Ambassador, Society for Financial Education and Professional Development

Heath F. Carelock, MPS, PMP, AFC[®], Program Director, PGCC Financial Empowerment Center, Prince George's Community College – Moderator

11:00 a.m. – 11:30 a.m.

NETWORKING/EXHIBITOR HALL

11:30 a.m. – 12:45 p.m.

WORKSHOP X:

CRYPTOCURRENCY AND INVESTING APPS

Cryptocurrency and investment apps are frequently highlighted in the news. The panelists will provide clarity of what cryptocurrency represents and how it is used. There will also be a presentation on investment apps and how they are being used to acquire investments. This workshop will include a presentation made by a financial behaviorist who will share thoughts and ideas on investment decision-making.

Yanely Espinal, Director, Next Gen Personal Finance, Creator of MissBeHelpful

Robert Kinzer, Financial Educator, Society for Financial Education and Professional Development

Steven Shu, Ph.D., Managing Principal, Digital Nudging Tech

Leslie M. Van Buskirk, Administrator, Division of Securities, Wisconsin Department of Financial Institutions (DFI) – Moderator

WORKSHOP XI:

DISASTER AND EMERGENCY PLANNING

Currently, Americans are coping with increasingly frequent national disasters and emergencies on a regular basis. The public constantly hears about events that occurred decades ago, but not about how to cope with current disasters. The panelists and moderator of this workshop will share Federal and state resources available for individuals and households to access should they confront a disaster or an emergency circumstance in their area. They will also cover the required documents needed to acquire resources and the availability of a disaster toolkit.

Julius Jones, Executive Officer, Office of the Chief Administrative Officer, Federal Emergency Management Agency (FEMA)
Allegra Tartaglia, Non-Governmental Services Branch Manager, Maryland Department of Emergency Management (MDEM)
Len Foxwell, Principal, Tred Avon Strategies; and Lecturer, John Hopkins University; Board Member, Society for Financial Education and Professional Development – Moderator

12:45 p.m. – 1:15 p.m.

LUNCHEON

INTRODUCTION OF LUNCHEON SPEAKER

Sherifa Clarke, Medgar Evers College, CUNY, Student Ambassador, Society for Financial Education and Professional Development

LUNCHEON SPEAKER

FINANCIAL CHALLENGES FOR WOMEN AND COMMUNITIES OF COLOR

Janet Alvarez, MBA, Harvard Nieman Fellow, Award-winning Financial Journalist, & CNBC + @Acorns Contributor

1:30 p.m. – 2:45 p.m.

WORKSHOP XII:

THE ROLE OF CDFIs AND MINORITY DEPOSITORY INSTITUTIONS IN ADDRESSING ECONOMIC DISPARITIES

This panel of financial experts will explain the role of Community Development Financial Institutions (CDFIs) and Minority Depository Institutions (MDIs). The panelists will share ways CDFIs and MDIs have made an impact in the communities they serve to address economic disparities such as the wealth gap, access to capital, and financial education. The workshop will discuss how microloans and financial education training help to provide access to capital, resources, and to procurement opportunities.

The key role CDFIs and MDIs continue to play in assisting small businesses during the ongoing pandemic will also be highlighted in this workshop.

Lloyd Doaman, Executive Director, Carver Community Development Corporation, Carver Bank

Martina Edwards, Chief Strategic Partnerships, Access to Capital for Entrepreneurs (ACE)

Alethia Mendez, Division President, Elevating Black Women Entrepreneurs, Grameen America Inc.

Tiffany Murray, Ph.D., AFC®, Managing Director, Society for Financial Education and Professional Development – Moderator

2:50 p.m. – 3:00 p.m.

TAKEAWAYS AND CLOSING REMARKS

Theodore R. Daniels, Founder & President, Society for Financial Education and Professional Development

3:05 p.m. – 3:45 p.m.

NETWORKING/EXHIBITOR HALL