

15th Annual Financial Literacy Leadership Conference

FINANCIAL WELLNESS: AGILITY & SUSTAINABILITY

**AND 25TH ANNIVERSARY
CELEBRATION**



OCTOBER 23-24, 2023

SFE**PD**

SOCIETY FOR FINANCIAL EDUCATION
& PROFESSIONAL DEVELOPMENT

ABOUT SFEPD

The Society for Financial Education and Professional Development (SFEPD) has a proven track record as a national leader in the financial literacy field in the United States. Established in 1998, SFEPD is one of the first educational nonprofits to deliver customized financial literacy programs and professional development opportunities for financial educators nationwide.

Our mission is to enhance financial and economic literacy and to promote the professional development of individuals in underserved communities.



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15th Annual Financial Literacy Leadership Conference

Financial Wellness: Agility & Sustainability

SFEPD's Annual Financial Literacy Leadership Conference is the destination for financial educators, federal and state policymakers, researchers, nonprofits, colleges and universities, students, and consumers to advocate for and enhance the financial literacy of Americans of all ages and backgrounds. Our top-rated conferences include organizations and individuals from across the nation and overseas. This year, we are featuring dynamic speakers and workshops with the theme "Financial Wellness: Agility & Sustainability."



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SCHEDULE AT A GLANCE

Monday, October 23, 2023

7:45-8:30 am
Continental Breakfast

8:30-8:45 am
Conference Welcome & Overview

8:45-9:15 am
General Session: Keynote Speaker
Susan K. Neely, President & CEO, American Council of Life Insurers (ACLI)

9:30-10:45 am
Concurrent Workshop 1: Cultural Relevancy in Financial Education
Concurrent Workshop 2: Making Money Moves

10:45-11:00 am
Break

11:00-12:15 pm
Concurrent Workshop 3: Psychology of Money
Concurrent Workshop 4: Media Coverage of Financial Education

12:30-1:45 pm
Luncheon with Keynote Speaker
Darrell K. Williams, President, Hampton University

2:00-3:15 pm
Concurrent Workshop 5: Digital Inequities: Its Impact on Financial Wellness
Concurrent Workshop 6: Retirement Myths & Opportunities

3:15-4:30 pm
General Session: Student Ambassadors in Action

7:00-9:30 pm
25th Anniversary Celebration
Reception & Dinner Program

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SCHEDULE AT A GLANCE

Tuesday, October 24, 2023

7:45-8:30 am
Continental Breakfast

8:30-9:45 am
HBCU Financial Literacy Bowl Sponsored by NEFE

10:00-11:15 am
Concurrent Workshop 7: Financial Technology: Trends & Tips
Concurrent Workshop 8: Effective Financial Literacy Presentations

11:15-11:30 am
Break

11:30-12:45 pm
Concurrent Workshop 9: Understanding the Economic Ecosystem
Concurrent Workshop 10: Money Habitudes

12:45-1:45 pm
Luncheon with Music & Money Talk

2:00-3:15 pm
General Session: Global Financial Literacy Talk

3:15-3:30 pm
Takeaways & Closing Remarks

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WORKSHOPS

Cultural Relevancy in Financial Education

Understanding cultural differences – including education levels, socioeconomic status, religion, family traditions, and geographic residencies – is important for effective financial literacy training. Attitudes toward money often depend on cultural context. Different ethnic groups and cultures have their own traditions and values about money, just as family and individual decision-making vary from culture to culture. In this workshop, panelists will examine how to be better stewards of financial education in working with diverse cultures and give tips on cultural relevancy.

- **Kameka Grady**, Assistant VP Marketplace & Community Diversity, Lincoln Financial Group
- **Ritta McLaughlin**, Director, Investor Education Community Outreach, FINRA Investor Education Foundation
- **Marcy Reyes**, Founder & CEO, The Financial Literacy Youth (FLY) Initiative
- **Gigi Wolf**, Lead Education Specialist, Federal Reserve Bank of Kansas City

Making Money Moves

Every day, individuals make financial decisions about the use of their money. Our financial values and priorities change throughout our lives because of life events and unforeseen circumstances. For example, according to a 2023 CNBC Financial Confidence Survey, 70 percent of Americans say they are stressed about their finances, and more than half say this stress has increased since the pandemic. These changing dynamics require us to be agile, resourceful, and adaptable in managing our available financial resources. In this workshop, the panelists will discuss how to make smart financial decisions throughout life changes/stages and present guidelines to ensure individual financial sustainability.

- **Dywane Hall**, MA, CRPC®, AIF®, Financial Advisor, LPL Financial
- **Shanan Hill**, Regional Banking District Manager, Wells Fargo Bank
- **Tacy Roby**, CFP®, Vice President/Wealth Advisor, Truist Private Wealth
- **Sylvia A. Watford**, AFC®, FFC®, Financial Educator/Coach

WORKSHOPS

The Psychology of Money

A complex relationship exists between the use of money and human behavior. Everyone uses different tactics in how they use their money, but the psychological approach people take to manage their finances can profoundly affect whether their efforts are successful. These challenges range from needing to learn the value of money and making hasty decisions to whether individuals and families understand strategies to maintain their financial well-being and create wealth. Panelists in this workshop will discuss the psychological influences of money and how it affects financial stability and resiliency.

- **Jaqee Cook**, Founder, Heart and Soul of Money
- **Jacqueline Howard**, Senior Director of Financial Health & Wellness, Ally
- **Spencer Johnson, MD**, CEO, Skyrocket Productions, LLC
- **David Tobin**, Vice President-Talent Consultant, Bank of America

Media Coverage of Financial Education

Securing media hits in today's news cycle is more competitive than ever due to the shrinking of traditional media and budget and staff cuts at news outlets. In this workshop, you will hear from top journalists with insights on how the media covers financial education, trends that attract news coverage, strategies for effective pitches, and tips for cultivating media relationships. The panelists will also discuss digital and social media's growing role in news dissemination and how to elevate your organization's messages and stories.

- **Janet Alvarez**, Deputy Business Editor, Philadelphia Inquirer
- **Melissa Daoulas**, Producer & Media Educator, Freelance
- **Stephanie Gaines-Bryant**, Reporter/Anchor, WTOP News
- **Rod Griffin**, Senior Director, Consumer Education & Advocacy, Experian

WORKSHOPS

Digital Inequities: The Impact on Financial Wellness

Digital access to financial information and transactions can be life changing. However, a lack of access can prevent individuals and households from using existing financial resources. As a result, financial resiliency and wealth creation can be limited. Moreover, for Americans living paycheck to paycheck, their financial well-being is consistently fragile due to a lack of knowledge. The moderator and panelists of this session will discuss what is being done to address the knowledge gap and how access to digital information can contribute to greater economic prosperity.

- **Winston Buckley**, Director of Communications, Teachers Retirement System of Georgia
- **Prakash Koirala**, Founder, FINLIT Nepal

Retirement: Myths & Opportunities

Effective retirement planning is essential to everyone's economic well-being. Yet currently, over 58 million Americans have not saved money for retirement. In this workshop, you can learn the steps to put in place to save for retirement and be successful during your "golden years." The panelists in this session will provide information on the drawdown of retirement savings, how to plan for retirement at any age, and opportunities to increase your financial assets before you retire. The panelists will share tips on rules, regulations, and laws that individuals need to know to make their retirement years stress-free and provide strategies to maximize investments.

- **Andree Taylor**, Program Manager: Financial Stability, Bank of America
- **Lanta Evans-Motte**, Financial Advisor, Raymond James
- **Kendra Kosko Isaacson**, Principal, Mindset DC
- **David John**, Senior Policy Advisor, AARP

General Session: Student Ambassadors in Action

College students need to understand how day-to-day budgeting and decision-making contribute to a foundation for a financially healthy life. SFEPD's Student Ambassadors will share how they teach essential financial literacy skills at HBCUs to their peers, families, and local communities. The Ambassadors will also discuss how this engaging student-centered project encourages financial sustainability practices and benefits HBCU communities.

WORKSHOPS

General Session: HBCU Financial Literacy Bowl

In this session, our Student Ambassadors from different HBCU campuses will compete in a financial literacy knowledge bowl competition. Teams from each participating HBCU will compete in a two-phased competition to see who is financially savvy. The 1st round of the competition was held virtually. In the 2nd round, the top 3 teams and their oversight professor will join us for a live competition.

- **Hampton University**
- **Southern University and A&M College**
- **Tuskegee University**



SFEPD HBCU Financial Literacy BOWL

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Financial Technology Trends & Tips

Financial technology has become increasingly influential in how we manage financial transactions in our daily lives. This technology includes using artificial intelligence, robot-financial advisors, mobile applications, digital transactions, and other methods of transactions. In this workshop, the panelists highlight the pros and cons of using financial tech and how to maximize its effectiveness to protect yourself in the marketplace. The workshop will also dive into the influence, and the role algorithms play in impacting our financial decision-making.

- **Mac Gardner, CFP®**, Founder & Chief Education Officer, FinLit Tech
- **John Moses**, Deputy Director, Office of Investor Education & Advocacy, United States Securities & Exchange Commission
- **Paul Roye**, Retired, Capital Research and Management Company

Effective Financial Literacy Presentations

The effectiveness of presentation skills for teaching financial literacy sessions will feature a comprehensive overview of the top seven techniques essential to designing and delivering dynamic financial literacy presentations. Participants will learn how to create engaging, interactive presentations to deliver high-quality sessions to key audiences while embedding exciting learning objectives, focus areas, and audience participation prompts. In this workshop, participants will strategize during a series of icebreakers designed to engage audiences at all levels while also providing instructional design focus within various financial literacy content areas. Attendees will demonstrate learned knowledge through a guided-peer learning and feedback-closing exercise.

- **Susan Bistransin**, Financial Education and Empowerment Coordinator, Prince George's County Public Schools
- **Marcus Creighton**, Founder and CEO, The Creighton Institute
- **Kristina Savoy**, Chief Learning Officer, District of Columbia Department of Human Resources

WORKSHOPS

Understanding the Economic Ecosystem

This session will examine the American financial system and how financial institutions contribute to the economic ecosystem. This workshop will include a discussion on the role that the Federal Reserve Board, the Office of the Comptroller of the Currency, and the Federal Housing Finance Agency play in managing the American economy to ensure stability, liquidity, and soundness of financial institutions. The panelists will also discuss non-bank financial companies such as hedge funds, open-ended mutual funds, and money market funds. These entities represent a significant source of capital in financial markets and provide vital funding for the American economy.

- **Val Baker**, Senior Program Analyst, Federal Housing Finance Agency
- **Andy Leventis**, PhD, Chief Economist, National Credit Union Administration
- **Louisa Quittman**, Community Development Expert, Office of the Comptroller of the Currency, United States Department of the Treasury

Music and Money

Music is integral to our daily routine, including when driving a car, exercising, or working with our earbuds or headphones. But music can also play a surprisingly significant role in personal finances. Studies show that music can be a stress reducer but also influences how you filter and analyze financial information and can be linked to spending behavior. Your playlist can impact not only your perception of your finances but also whether you are spending too much or paying bills on time. In this session, our panelists will share how to use music and the right beat to improve your financial decision-making choices and behavior.

- **Dyalekt**, Co-Founder and Director of Pedagogy, Pockets Change
- **Kenrick Thomas**, Senior Communications Consultant, Wells Fargo

Global Financial Literacy Talk with Ted Daniels

Join Ted Daniels with a top financial education leader for a conversation about the growth of financial education programs worldwide and how this movement is transforming the lives of individuals and families in global communities.

- **Ted Daniels**, Founder & CEO, SFEPD
- **Dan Iannicola**, CEO, Financial Literacy Group

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