TWO-DAY SUMMIT ON
KINDERGARTEN THROUGH POSTSECONDARY
FINANCIAL EDUCATION

FEBRUARY 21-22, 2007
WASHINGTON, DC

AGENDA

WEDNESDAY, FEBRUARY 21, 2007 – U.S. DEPARTMENT OF EDUCATION
400 Maryland Avenue, SW, Departmental Auditorium FB-6, Washington, DC

10:00 AM OPENING REMARKS
Mr. Morgan Brown
Assistant Deputy Secretary, Office of Innovation and Improvement
U.S. Department of Education

Mr. Dan Iannicola, Jr.
Deputy Assistant Secretary, Office of Financial Education
U.S. Department of the Treasury

10:15 AM FEATURED SPEAKER
Mr. Raymond Simon
Deputy Secretary, U.S. Department of Education

10:30 AM LEARNING ABOUT MONEY: THE STUDENT’S PERSPECTIVE
Ms. Sara Caez, Carlos Albizu University
Ms. Jelani Gibson, SEED Public Charter School
Mr. Stephen F. Hunsaker, Texas Tech University
Ms. Sierra Mack, SEED Public Charter School
11:30 AM  INTEGRATION OF FINANCIAL EDUCATION IN THE K-12 CLASSROOM
Ms. Michelle Aldrich, Teacher of Family and Consumer Science
Triumph High School in Cheyenne, Wyoming

Ms. Sally Finch, Teacher of Economics
Westminster School in Atlanta, Georgia

Ms. Katherine Loesl-Borth, Teacher of Social Studies
Samuel Morse Middle School in Milwaukee, Wisconsin

12:30 PM  LUNCH ON YOUR OWN

2:00 PM.  FINANCIAL EDUCATION AT POSTSECONDARY INSTITUTIONS
Ms. Sarah Billiter
Transylvania University

Mr. Ted Daniels, President and CEO
Society for Financial Education and Professional Development

Ms. Claudia Kerbel, Director of Outreach, Center for Personal Financial Education
University of Rhode Island

3:00 PM  INCREASING FINANCIAL LITERACY THROUGH CLASSROOM VOLUNTEERS
Ms. Buffy Murphy, Compliance Officer
BancorpSouth

Ms. Donna Steckino, President and CEO
Community Credit Union of Maine

Mr. Danny C. Ng, Director of Capital Markets Technology
E-Trade Financial

Mr. John Scanlon, Executive Vice President of Strategic Growth
Intersections, Inc.

4:00 PM  CLOSING REMARKS

4:15 PM  INFORMAL NETWORKING SESSION
1500 Pennsylvania Avenue, NW, Cash Room, Washington, DC

9:00 AM   OPENING REMARKS
Mr. Emil Henry, Jr.
Assistant Secretary for Financial Institutions
U.S. Department of the Treasury

9:10 AM   FEATURED SPEAKER
Ms. Anna Escobedo Cabral
Treasurer of the United States
U.S. Department of the Treasury

9:30 AM   STATE GUIDELINES, STANDARDS AND LAWS
Mr. Marc Drews, Senior Associate, Office of Curriculum and Standards
South Carolina Department of Education

Ms. Julie Felshaw, Economics and Financial Education Specialist
Utah State Office of Education

Ms. Hilary Hunt, Director
Pennsylvania Office of Financial Education

10:30 AM   BREAK

10:45 AM   TEACHER PROFESSIONAL DEVELOPMENT ON FINANCIAL EDUCATION TOPICS
Mr. David Mancl, Director, Office of Financial Literacy
Wisconsin Department of Financial Institutions

Dr. James O’Neill, Director, Center for Economic Education and Entrepreneurship
University of Delaware

Ms. Megan O’Neill-Haight, Family, Youth and Communities Finance Educator
Maryland Cooperative Extension

Dr. Helen Roberts, Clinical Assistant Professor, Department of Economics
University of Illinois at Chicago

11:45 AM   LUNCH ON YOUR OWN
1:15 PM  EVALUATION OF FINANCIAL LITERACY PROGRAMS: LOOKING AT THE RESULTS
Dr. Darrell Luzzo, Senior Vice President of Education
Junior Achievement Worldwide

Dr. Lewis Mandell, Professor of Finance and Managerial Economics
State University of New York – University at Buffalo

Dr. Sharon M. Danes, Professor of Family Economics
University of Minnesota

Mr. Robert Ward, Senior Vice President
Fabrizio, McLaughlin & Associates

2:15 PM  FINANCIAL EDUCATION IN NON-TRADITIONAL VENUES
Mr. Kevin Wylie Curry, Jr.
North Carolina Camp Challenge

Ms. Susan S. Kalich
Boys and Girls Club of Pennsylvania

Ms. Mary Ravid, Chief Instructional Officer
ASPIRA Inc. of Illinois

3:15 PM  BREAK

3:30 PM  CHALLENGES GOING FORWARD
Mr. Robin C. Hovis, Board Member-at-Large
Ohio Department of Education

Mr. James Rubillo, Executive Director
National Council of Teachers of Mathematics

4:30 P.M.  CLOSING REMARKS