

ARIZONA SAVES' FINANCIAL EDUCATION SYMPOSIUM

8:30am – 3:00pm
Wed., November 5, 2008
Black Canyon Conference Center
9440 N. 25th Ave.
Phoenix, Arizona

Purpose of the Event: Arizona Saves' Financial Education Symposium on Nov. 5th, 2008 will bring together leaders in financial education, non-profit organizations, financial institutions, and government leaders to learn about and discuss strategies to improve financial education services and financial stability for Arizona residents. Attendees will learn about national trends in financial education and also have an opportunity to discuss how financial education and access to affordable financial services can be enhanced in our community.

Who Should Attend? Any business leader, non-profit agency, government staff, or financial institution representative, interested in financial education and affordable financial services should attend.

Cost: \$35.00

Space is limited. Register online at arizonasaves.org by Oct. 30, 2008

For more information contact Patrick Jordan at 602.246.3510 or at pjordan@arizonasaves.org

TOOLS FOR SUCCESS



Arizona**Saves**

Bank of America



NATIONAL ENDOWMENT FOR
FINANCIAL EDUCATION
Partnering for Financial Well-Being



City of Phoenix



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TOOLS FOR SUCCESS

SYMPOSIUM PROGRAM:
WED., NOVEMBER 5, 2008



8:30 - 9am REGISTRATION / NETWORKING /
BREAKFAST (Lobby / Café Dining)

9 - 9:20am WELCOME / INTRODUCTIONS
(Black Canyon Ballroom)

- Maria Echeveste, Senior Vice President, Community Impact Market Manager, Bank of America
- Phil Gordon, Mayor of Phoenix (Invited)
- Jan Bontrager, Regional Manager, Community Development, Federal Reserve Bank of San Francisco
- Patrick Jordan, Executive Director, Arizona Saves

9:20 - 9:40am *Review of Financial Education Program Evaluation Research*, Laura Choi, Research Associate, Federal Reserve Bank of San Francisco

9:40 - 9:55am *Community Development and Financial Stability, Building Successful Partnerships*, Brian Spicker, Senior Vice President, Valley of the Sun United Way

9:50 - 10am BREAK

10 - 11:10am MORNING BREAKOUTS &
DISCUSSION SESSIONS: (Choose one)

- *Youth Financial Education*, Brent Neiser, Director of Strategic Programs and Alliances, National Endowment for Financial Education, (Arizona Room)
- *Financial Product Innovations from Credit Unions*, Pat Bodnar, Arizona Credit Union System; Danny Mazza, Arizona Federal; Kelly Tylwalk, Desert Schools Federal Credit Union; Debra McConnell, Alhambra Schools Credit Union (Boulder Room)
- *Budgeting in a Time of Crisis*, Jennifer Quillin, Assistant Director, Arizona Saves; Darina Tolono, Certified Housing Counselor, Neighborhood Housing Services, Phoenix (Echo Canyon Room)

11:10 - 11:25am BREAK / NETWORKING (15 min.)

11:25 - 11:50am *The Color of Wealth, The Story Behind the U.S. Racial Wealth Divide*, Barbara Robles, PhD, Center for Community Development & Civil Rights, School of Social Work, Arizona State University (Black Canyon Ballroom)

11:50am - 12:20pm *Financial Education and the Road to Success*, Mitzila Hogans, Community Initiatives Coordinator, Human Services Department, city of Phoenix and Success Stories from city of Phoenix Family Self-Sufficiency Participants (Black Canyon Ballroom)

12:20 - 1pm LUNCH BUFFET SERVED

1 - 1:30pm *Lessons from the "Bank On San Francisco" Experience*, Leigh Phillips, Program Manager, "Bank On San Francisco", city of San Francisco (Black Canyon Ballroom)

1:40 - 2:40pm AFTERNOON BREAKOUT &
DISCUSSION SESSIONS (Choose one)

- *Outcomes and Financial Education, Achieving Sustainability and Changing Behavior*, Laura Choi, Research Associate, Federal Reserve Bank of San Francisco; Patrick Jordan, Executive Director, Arizona Saves (Boulder Room)
- *Exploring a "Bank on the Valley" Initiative*, Leigh Phillips, Program Manager, "Bank On San Francisco", city of San Francisco, Trinity Donovan, Valley of the Sun United Way, Maria Echeveste, Bank of America, Jan Bontrager, Federal Reserve Bank of San Francisco, Tanya Wheelless, Arizona Bankers Association, Carolyn Mitchell, Community Development Manager, Wells Fargo (Arizona Room)

2:45 - 3:00pm *Asset Based Community Development Symposium Evaluation*, Patrick Jordan, Executive Director, Arizona Saves

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REGISTRATION DEADLINE:
THURS., OCTOBER 30, 2008



FEE: \$35 PER PERSON. Register online and pay by credit card at arizonasaves.org or send this form by mail with your check payable to Arizona Saves at 6633 N. Black Canyon Highway, Phoenix, AZ 85015. Please complete one form for each person registering by mail. Registration fee includes breakfast, lunch, and afternoon snacks.

Name _____ Title _____
Organization _____
Address _____
City _____ State _____ Zip _____
Phone _____ eMail _____

BREAKOUT SESSION REGISTRATION: Please choose one session from each the morning and afternoon breakouts.

10 - 11:10am **MORNING BREAKOUTS & DISCUSSION SESSIONS:** (Choose one)

- Youth Financial Education**, Brent Neiser, Director of Strategic Programs and Alliances, National Endowment for Financial Education (**Arizona Room**)
- Financial Product Innovations from Credit Unions**, Pat Bodnar, Arizona Credit Union System; Danny Mazza, Arizona Federal; Kelly Tylwalk, Desert Schools Federal Credit Union; Debra McConnell, Alhambra Schools Credit Union (**Boulder Room**)
- Budgeting in a Time of Crisis**, Darina Tolono, Certified Housing Counselor, Neighborhood Housing Services, Phoenix (**Echo Canyon Room**)

1:40 - 2:40pm **AFTERNOON BREAKOUT & DISCUSSION SESSIONS** (Choose one)

- Outcomes and Financial Education, Achieving Sustainability and Changing Behavior**, Laura Choi, Research Associate, Federal Reserve Bank of San Francisco; Patrick Jordan, Executive Director, Arizona Saves; Leigh Phillips, Program Manager, Bank on San Francisco, city of San Francisco (**Boulder Room**)
- Exploring a "Bank on the Valley" Initiative**, Leigh Phillips, Program Manager, "Bank On San Francisco", city of San Francisco, Trinity Donovan, Valley of the Sun United Way, Maria Echeveste, Bank of America, Jan Bontrager, Federal Reserve Bank of San Francisco, Tanya Wheelless, Arizona Bankers Association, Carolyn Mitchell, Community Development Manager, Wells Fargo (**Arizona Room**)

Please check this box to be removed from the contact list that will be distributed to all attendees.