Departments of the Treasury and Health and Human Services
Relationship Finance Summit - Theory and Practice

Department of the Treasury – Media Room (4121)
1500 Pennsylvania Avenue, NW - Washington, DC
January 14, 2009

9:30 Registration

10:00 Welcome Remarks
Dan Iannicola, Jr.
Deputy Assistant Secretary for Financial Education
U.S. Department of the Treasury

10:10 Overview
Dr. Craig Israelsen
Associate Professor, Department of Home and Family Living
Brigham Young University

THEORY

10:30 Decision Making Models/Dynamics within Couples with respect to Money Decisions
Moderator: Dan Iannicola, Jr. – Department of the Treasury

- Dr. William C. Bailey, Associate Professor
  School of Human Environmental Sciences, University of Arkansas
  Topic: What we know about family and money conflicts

- Dr. Deborah C. Haynes, Associate Professor, Consumer Economics
  Department of Health and Human Development, Montana State University
  Topic: Economic and financial well-being: the intersection of families and relationships in financial education

- Dr. Mari Wilhelm, Deputy Director, Center of Excellence in Women's Health, and Director, Evaluation Research and Development, University of Arizona
  Topic: The dynamics of intergender differences

- Dr. Celia Hayhoe, Associate Professor
  Apparel, Housing and Resource Management - Virginia Tech University
  Topic: How children influence family finances

12:00 Lunch on Your Own

PRACTICE

1:30 Counseling Practitioners' Perspective
Moderator: Linda Mellgren, U.S. Department of Health and Human Services

- Dr. Anupa Bir, ScD, MPH - Women, Children, and Families Program Director
RTI International
Topic: U.S. Department of Health and Human Services Roundtable on Marriage Education, Financial Literacy, and Asset Development

- Joseph Jones, Founder, President, and Chief Executive Officer
Center for Urban Families
Topic: Low-income couples approaches to financial education and money

- Stewart Kaplan, Master in International Management, Registered Financial Consultant, Community Readiness Consultant, 11 Wing Airman and Family Readiness Flight – Air Force
Topic: Military personal financial counseling perspective

2:30 Break

2:45 Financial Services Practitioners' Perspective
Moderator: Dan Iannicola, Jr.

- Lori Epstein, Vice President, MetLife
Topic: Helping couples manage financial risk

- Neil D. Kossler, CPA, MST, Managing Member, Kossler Jones & Company, LLC and Virginia Society of Certified Public Accountants
Topic: Couples' problems with money management

- Katie Wethman, CPA, MBA, Realtor
Keller Williams Realty
Topic: *Navigating a real estate purchases with couples*

3:45 Closing Remarks
Dr. A. William Gustafson, Senior Director, Center for Financial Responsibility
Personal Financial Planning, Texas Tech University

4:00 Meeting Adjournment

4:00 Informal Networking
(The room will be made available for informal discussions among participants.)