



**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



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- 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



THURSDAY, FEBRUARY 22, 2007 – U.S. DEPARTMENT OF THE TREASURY
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



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- 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