



Roundtable Discussion on Financial Education in African-American Communities

March 4, 2008
9:00 a.m. to 4:00 p.m.
U.S. Department of the Treasury
Cash Room

Agenda

- 8:30 a.m. Registration
- 9:00 a.m. **Welcoming Remarks**
Mr. Dan Iannicola, Jr., Deputy Assistant Secretary for Financial Education
U.S. Department of the Treasury
- Featured Speaker**
Ms. Anna Escobedo Cabral, Treasurer of the United States
U.S. Department of the Treasury
- 9:15 a.m. **Overview of Financial Education Issues in the African-American Community**
Dr. Charles Betsey, Professor, Department of Economics, Howard University
- 9:35 a.m. **Credit Literacy**
Mr. James Carr, Chief Operating Officer
National Community Reinvestment Coalition
- Ms. Loretta Abrams, Senior Vice President - Consumer Affairs
HSBC-North America
- Mr. William Cheeks, President, ABBA Associates, Inc.
- 11:00 a.m. **Reaching the African-American Market (Media and Messages)**
Mr. Kelvin Boston, Executive Producer and Host, *Moneywise*
- 11:45 a.m. *Lunch on Your Own*
- 1:30 p.m. **Federal Agency Updates**

1:45 p.m.

Preparing for the Future: Youth and Higher Education

Mr. Theodore Daniels, President and CEO

Society for Financial Education and Professional Development

Ms. Carmela Cohen-Perry, Default Manager and Financial Aid Administrator
Saint Augustine's College

Dr. Farrah Gray, Author, *Reallionaire: Nine Steps to Becoming Rich from the Inside Out* and *Get Real, Get Rich: Conquer the 7 Lies Blocking You from Success*

2:45 p.m.

Retirement Readiness

Ms. Lisa M. Toppin, Vice President, Employee Development and Inclusion,
Charles Schwab & Co., Inc.

Ms. Katie Taylor, Director of Housing and Financial Education
National Urban League

Mr. Lee Baker, CFP, Apex Financial Services
Chair, Diversity Task Force, Financial Planning Association

3:30 p.m.

Closing Thoughts

Mr. John Hope Bryant, Chairman and Founder, Operation HOPE, Inc.