Agenda

8:00 – 9:00  Continental Breakfast and Registration  Foyer

9:00 – 9:30  Opening Greeting  Reed CD
Dwayne Boggs
Vice President & Managing Officer, Federal Reserve Bank of Kansas City, Oklahoma City Branch

9:30 – 10:30  State Policy Innovations in Support of Financial Education  Reed CD
Moderator:
Steven Shepelwich
Senior Community Affairs Advisor, Federal Reserve Bank of Kansas City, Oklahoma City Branch
Panelists:
• Heather Morton
  Senior Policy Specialist, National Conference of State Legislatures
• Heather Tyler
  Executive Policy Specialist, Pennsylvania Office of Financial Education
• David Mancl
  Director, Wisconsin Office of Financial Literacy

10:30 – 10:45  Break

10:45 – 11:45  Looking to the Horizon: Policies to Support Financial Education in Oklahoma  Reed CD
A facilitated discussion on policy opportunities and priorities for Oklahoma

12:00 – 1:00  Luncheon Presentation  Reed CD
Terry Almon
President and CEO, Arkansas Valley State Bank and
Director, Federal Reserve Bank of Kansas City, Oklahoma City Branch
1:15 – 2:15 **Reaching Out to New Markets through Partnerships**

Moderator:
Michelle Kelley
Educational Services Manager, The Oklahoman

Panelists:
- Julia Stephens  
  *Director of Grant Programs, AARP Foundation*
- Brooke Ely  
  *Training Director, National Coalition Against Domestic Violence*
- Aaron Schultz  
  *Research Officer, First Nations Development Institute*

2:30 – 3:45 **Concurrent Sessions: Financial Education Strategies and Resources**

**Financial Education in the School:**

**Tools and Strategies for Reaching Youth in the Classroom**

- Sue Lynn Sasser, *Oklahoma Council on Economic Education (moderator)*
- Anna Knight, *Cherokee Nation*
- Lori Goodbary, *Oklahoma Department of Career and Technology Education*
- April Bortmess, *Junior Achievement of Greater Oklahoma City*

**Adult Financial Education: Delivering Programs to Meet Diverse Needs**

- Angela Caddell, *Oklahoma Money Matters (moderator)*
- Jackie Jacobi, *Red River Technology Center*
- Sharon Oamek, *Federal Reserve Bank of Kansas City, Omaha Branch*
- Monica Armstrong, *Bank of Oklahoma*

**New Financial Products and Services:**

**Bringing Together Education and Opportunity**

- Christopher Tan, *Shorebank Advisory Services*
- Ed Jacobs, *North Side Community Federal Credit Union*
- Tom Lilley, *Central Bank of Kansas City*

**Overview of the New Bankruptcy Legislation**

- Jennifer Delcamp, *Consumer Credit Counseling Services of Central Oklahoma*
- Margo Mitchell, *Consumer Credit Counseling Services of Oklahoma*
- Kelly Edmison, *Federal Reserve Bank of Kansas City*

3:45 – 4:00 **Break with Refreshments**

4:00 – 4:30 **Building Partnerships for Financial Education**

Senator Daisy Lawler

4:30 – 4:45 **Closing**

Steven Shepelwich
*Senior Community Affairs Advisor, Federal Reserve Bank of Kansas City, Oklahoma City Branch*