

2007
Annual Conference on
Financial Education[™]
presented by the INSTITUTE FOR FINANCIAL LITERACY*



KEYNOTE SPEAKER
ROBERT D. MANNING, PH.D.
DISTINGUISHED AUTHOR OF
CREDIT CARD NATION

ALSO AT THE CONFERENCE:
1ST ANNUAL EIFLE AWARDS[™]
EXCELLENCE IN FINANCIAL LITERACY EDUCATION[™]

- EDUCATOR OF THE YEAR
- ORGANIZATION OF THE YEAR
- BOOK/CURRICULUM OF THE YEAR

Join us for the 2007
Annual Conference on
Financial Education[™]
presented by the INSTITUTE FOR FINANCIAL LITERACY*

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TOPICAL AREAS WILL INCLUDE:
NATIONAL STANDARDS IN FINANCIAL EDUCATION
EFFECTIVE GRANT WRITING
PRIVATE SECTOR'S ROLE IN FINANCIAL EDUCATION
FINANCIAL EDUCATION IN SUBPRIME MORTGAGE MARKETS
DEVELOPING TRENDS IN INVESTOR EDUCATION
DISPELLING CREDIT BUREAU MYTHS
INSURANCE AND RISK MANAGEMENT EDUCATION

Institute for Financial Literacy
P.O. Box 1842
Portland, ME 04104



2007
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Financial Education[™]
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CONFERENCE SCHEDULE

Wednesday, October 3

6:00 p.m.-9:00 p.m. SETUP AND REGISTRATION

7:00 p.m.-10:00 p.m. **OPENING RECEPTION**

Thursday, October 4

7:00 a.m.-8:00 a.m. **CONTINENTAL BREAKFAST**

7:00 a.m.-9:00 a.m. SETUP AND REGISTRATION

9:00 a.m.-9:30 a.m. **WELCOME AND OPENING REMARKS**

9:30 a.m.-10:15 a.m.

SESSION I: THE PRIVATE SECTOR'S ROLE IN FINANCIAL EDUCATION
Corporate sponsors can offer many different resources to support the work of financial educators. This session will discuss what is available, how to effectively engage potential sponsors and how to encourage broader participation in your programs.

Jason Alderman, Director of Education Programs - VISA USA

Mr. Alderman directs the financial education programs of VISA, USA, including the Practical Money Skills for Life and What's My Score initiatives and sits on the boards of the California JumpStart Coalition and the Financial Literacy Advisory Board of the American Association of Family and Consumer Sciences.

10:15 a.m.-10:45 a.m. **BREAK**

10:45 a.m.-12:00 p.m.

SESSION II: NATIONAL STANDARDS IN FINANCIAL EDUCATION: MOVING BEYOND THE PAPER THEY'RE PRINTED ON

Standards are only effective when put into practice. This session will discuss available standards, how to translate them into practical applications, and how to implement them.

Laura Levine, Executive Director - JumpStart Coalition

Prior to joining JumpStart, Ms. Levine served as Director of Education and Information for the NASD Office of Individual Investor Services, Director of NASDAQ Educational Foundation, and on the Industry Advisory Committee for DC Public Schools.

Gwen Reichbach, Ph.D., President - Gwen Reichbach & Associates

A member of the Institute for Financial Literacy's board, Dr. Reichbach is the retired Executive Director of the National Institute for Consumer Education (NICE) and a former Director of Education and Community Relations for Military Installment Loan and Education Services.

12:00 p.m.-1:00 p.m. **LUNCH & KEYNOTE ADDRESS**

Robert D. Manning, Ph.D., Author - Credit Card Nation

Dr. Manning is a Research Professor and the Director of the Center for Consumer Financial Services at Rochester Institute of Technology. A widely recognized expert on issues of consumer finance, he regularly appears before Congress and in the media.

1:00 p.m.-2:00 p.m.

SESSION III: CREDIT REPORTS AND CREDIT SCORES

Credit reports and credit scores impact consumers' ability to obtain credit and how much it will cost. This session will discuss myths surrounding credit reports and credit scores and explore how credit bureaus and financial educators can work together effectively.

Rod Griffin, Senior Manager of Public Education - Experian

Mr. Griffin is responsible for Experian's national consumer education program and for supporting the company's public relations activities. He also produces Experian's consumer education materials and co-writes an online consumer advice column.

2:00 p.m.-3:00 p.m.

SESSION IV: DEVELOPING TRENDS IN INVESTOR EDUCATION

Investor education is perhaps the most sought after and widely available subject in the financial education field. This session will discuss the current trends, identify the knowledge gaps and evaluate the impact of available investor education materials.

TBA

3:00 p.m.-3:30 p.m.

BREAK

OCTOBER 3-5, 2007

**WESTIN CITY CENTER
HOTEL**

DALLAS, TEXAS



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Hotel Accommodations

- The conference will be held at the Westin City Center Hotel in Dallas, Texas
- Room Reservations should be made directly with the hotel at **1-214-979-9000** or **1-800-WESTIN-1**
- Remember to tell the hotel you are with the **Annual Conference on Financial Education** in order to get the conference room rate!
- The conference room rate is \$175.00 per night, plus tax
- **To obtain the conference room rate, you must reserve a room by September 10, 2007**
- Check in is 3:00 pm, check out is 12:00 pm
- For more information about the hotel and its accommodations, please visit their website at:

www.westin.com/citycenterdallas



WESTIN CITY CENTER HOTEL

DALLAS, TEXAS

October 3-5, 2007

CEU CREDIT AVAILABLE

SOUTH CAROLINA CPE (APPROVAL PENDING)
CERTIFIED PERSONAL FINANCE COUNSELOR[™]
(CPFC[™])
CERTIFIED EDUCATOR IN PERSONAL FINANCE[™]
(CEPF[™])

CONFERENCE SCHEDULE (continued)

- 3:30 p.m.-4:30 p.m. **SESSION V: BEST PRACTICES IN TEACHING RISK MANAGEMENT**
Risk management and insurance get relatively little coverage from financial educators. This session will discuss the importance of insurance to consumers, clarify commonly held misconceptions and propose key points that should be conveyed to students.
Jason Terrell, Director of Programs - Insurance Education Institute
The mission of the Insurance Education Institute is to improve the understanding of insurance and risk management and their role in society by educating young people, creating curricula and providing teachers with professional development opportunities.
- 5:30 p.m.-7:00 p.m. **DINNER & PRESENTATION OF THE 1ST ANNUAL EXCELLENCE IN FINANCIAL LITERACY EDUCATION (EIFLE™) AWARDS™**
- 7:00 p.m. **MOVIE: *In Debt We Trust: America Before The Bubble Bursts***
- Friday, October 5**
- 7:00 a.m.-8:00 a.m. **CONTINENTAL BREAKFAST**
- 8:00 a.m.-10:00 a.m. **SESSION VI: EFFECTIVE GRANT WRITING FOR FINANCIAL EDUCATORS**
Grant funding is critical to most financial education efforts, yet the grant application process mystifies many educators. This session will discuss identifying grant makers, matching them with specific initiatives and developing effective grant proposals.
John O'Malley, O'Malley International Assoc.
Mr. O'Malley has prepared and written all manner of grant proposals to federal, state and city agencies and private/public foundations, including performing proposal planning and grant writing tasks in support of education and training programs for the LA Unified School District.
- 10:00 a.m.-10:30 a.m. **BREAK**
- 10:30 a.m.-11:30 a.m. **SESSION VII: THE ROLE OF FINANCIAL EDUCATION IN THE SUBPRIME MORTGAGE MARKET**
The media has raised the specter of a crisis in the subprime mortgage market. This session will discuss legislative efforts to educate prospective subprime mortgage clients and what role lenders see for financial education in the subprime mortgage market.
TBA
- 11:30 a.m.-12:00 p.m. **CLOSING REMARKS**
- 1:00 p.m.-2:45 p.m. **REVIEW SESSIONS FOR CPFC/CEPF (pre-registration required)**
- 3:00 p.m.-5:00 p.m. **CPFC & CEPF EXAMS (pre-registration required)**

**Join us as we screen the acclaimed film *In Debt We Trust!*
Thursday, October 4 at 7:00 p.m.**

ALSO AT THE CONFERENCE:

1ST ANNUAL EIFLE AWARDS™
EXCELLENCE IN FINANCIAL LITERACY EDUCATION™

The Excellence In Financial Literacy Education Award™ was created to acknowledge innovation, dedication and the commitment of those supporting financial literacy education. It will be awarded each year at the Annual Conference on Financial Education, with multiple categories:

EDUCATOR OF THE YEAR. Awarded to an individual who (1) teaches financial literacy education, though does not necessarily work for a financial literacy organization; (2) promotes financial literacy education in the local community, educational settings, and/or outreach programs; (3) inspires students of all backgrounds to learn; (4) has earned the respect and admiration of their students and peers; (5) is committed to ongoing personal professional development; and (6) utilizes quality financial literacy educational materials.

ORGANIZATION OF THE YEAR. Awarded to an organization that (1) offers a financial literacy program, though it need not be a financial literacy organization by mission; (2) has earned the respect of peer organizations and the communities it serves; (3) inspires those individuals participating in its programs to learn; and (4) utilizes quality financial literacy educational materials.

BOOK/CURRICULUM OF THE YEAR. Awarded for books/curricula with a 2005 or 2006 copyright date. Copyright restrictions and terms of use need to be clearly stated. Content must: (1) use concise language and age/ability appropriate vocabulary; (2) clearly define technical terms, abbreviations, and acronyms; (3) be relevant to target audiences; (4) appeal to multiple learning styles; (5) be informative and unbiased in nature; (6) present content in an objective and neutral tone; (6) provide accurate information; and (7) not deceive or mislead the reader.

WITH SPECIAL THANKS TO OUR SPONSORS:



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For More Information
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Institute for Financial Literacy
PO Box 1842
Portland, ME 04104
conference@financiallit.org
www.financiallit.org
207-221-3611



2007

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October 3-5, 2007

Attendee Registration Form

Dallas, Texas

Conference Registration Instructions

Fax or mail this form to:
Institute for Financial Literacy
Attn: Registration
PO Box 1842
Portland, ME 04104
Phone: 207-221-3611
Fax: 207-221-3691

Please submit this form by September 22, 2007.
Late Registration is also available.

Registration is not accepted without payment.

Cancellations & Refunds
Cancellations must be made in writing.

\$50 service fee deducted from refunds for cancellations post-marked before August 31, 2007

\$100 service fee deducted from refunds for cancellations post-marked before September 15, 2007

No refunds after September 15, 2007

Attendee substitutions may be made in writing by the original registrant.

Questions?
Please contact us at
207-221-3611
conference@financiallit.org

Attendee Name _____
First Middle Initial Last

Job Title _____

Organization _____

Work Address _____
Street City State Zip

Work Phone _____ Email _____

Payment Information (please check one)
 Check Enclosed (payable to Institute for Financial Literacy)
 Credit/Debit Card (MC, Visa, Discover, AmEx)

Cardholder Name _____

Card Number _____

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Amount to be charged (check only one):

- \$325.00 Early Bird Registration
(Postmarked before ~~8/6/07~~
Extended to 8/22/07)
- \$350.00 Conference Registration
(Postmarked between ~~8/6/07~~ & 9/22/07
8/22/07)
- \$400.00 Late Registration
(Postmarked after 9/22/07)

Signature _____

Date _____
Signature above authorizes IFL to charge the listed card for the amount marked.

PHOTO DISCLOSURE
By attending this conference, all attendees agree that their image or likeness may be captured in one or more media, and that said images may be reproduced by the Institute for Financial Literacy for its reasonable business purposes.

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