



2008

# Annual Conference on **Financial Education**™

presented by the **INSTITUTE FOR FINANCIAL LITERACY**®

## CONFERENCE SCHEDULE

### Wednesday, September 10

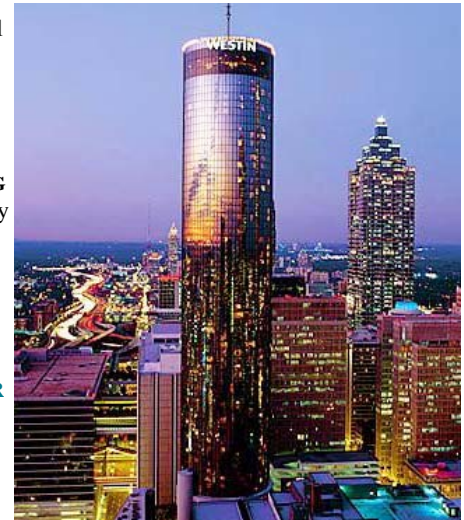
- 12:00 p.m.-5:30 p.m. REGISTRATION
- 4:00 p.m.-6:00 p.m. SETUP
- 1:00 p.m.-2:30 p.m. **SESSION I-A: FINDING FINANCIAL SUPPORT IN UNCERTAIN TIMES - GRANT WRITING**  
External funding, especially corporate and foundation support, is critical to every successful financial education initiative. Recent economic troubles will likely increase the challenge of securing grants for educators over the next 12 months. This session will focus on dealing with this reality and, at the same time, on preparing strong proposals and getting the funding educators need.  
**John O'Malley, President - O'Malley International Assoc.**
- 2:30 p.m.-2:45 p.m. **BREAK**
- 2:45 p.m.-4:00 p.m. **SESSION I-B: FINDING FINANCIAL SUPPORT IN UNCERTAIN TIMES - GRANT WRITING**  
Part II will offer more guidance on how to make proposals that focus on financial literacy stand out and catch the attention of grant makers. There will be a discussion on misguided approaches to proposal development. What's more, there will be interactive exercises that improve understanding of the grant seeking process. Emphasis will be placed on smart and successful practices that get results.  
**John O'Malley, President - O'Malley International Assoc.**
- 6:00 p.m.-8:00 p.m. **EXCELLENCE IN FINANCIAL LITERACY EDUCATION™ (EIFLE™) AWARDS DINNER**  
**SPONSORED BY AMERICAN CENTURY INVESTMENTS**  
The Excellence in Financial Literacy Education™ (EIFLE™) Award was created by the Institute for Financial Literacy to acknowledge the innovation, dedication, and the commitment of those that support financial literacy education. Categories honored include Books/Curricula of the Year, Educator of the Year and Organization of the Year.  
**TBA**

### Thursday, September 11

- 7:30 a.m.-8:45 a.m. **CONTINENTAL BREAKFAST**
- 7:30 a.m.-8:45 a.m. **BOOK SIGNING**  
**Curtis E. Arnold, Author and Founder - U.S. Citizens for Fair Credit Card Terms, Inc.**  
*How You Can Profit From Credit Cards: Using Credit to Improve Your Financial Life and Bottom Line*
- 7:30 a.m.-9:00 a.m. SETUP AND REGISTRATION
- 9:00 a.m.-9:15 a.m. **WELCOME**  
**Bobbie McCrackin, VP and Public Affairs Officer - Federal Reserve Bank of Atlanta**  
Ms. McCrackin directs external relations for the Federal Reserve Bank of Atlanta, including media relations, publications, websites, conferences, outreach activities, economic education, community service; she also oversees the Bank's research library.
- 9:15 a.m.-9:30 a.m. **OPENING REMARKS**
- 9:30 a.m.-10:45 a.m. **SESSION II: THE CREDIT CRUNCH: KEYWORDS AND PHRASES OF THE TIGHTENING CREDIT MARKETPLACE, AND WHAT THEY MEAN TO YOU**  
A number of new terms have emerged from the subprime mortgage collapse, and a number of old words and phrases have taken on new significance for consumers. This session will explore a number of these new and evolving terms and how the changes are impacting consumers.  
**Rod Griffin, Senior Manager of Public Education - Experian**
- 10:45 a.m.-11:00 a.m. **BREAK**
- 11:00 a.m.-12:15 p.m. **SESSION III: RISK MANAGEMENT: KEEPING COVERAGE WHEN IT'S ALREADY RAINING**  
Adequate insurance coverage is a critical aspect of financial health, but often among the

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### Hotel Accommodations

- Room Reservations should be made directly with the hotel at **1-888-627-7087**
- Make sure you mention the **Institute for Financial Literacy Annual Conference on Financial Education** to get the conference room rate!
- The conference room rate is \$179.00 per night, plus tax
- **To obtain the conference room rate, you must reserve a room by August 10, 2008**
- Check in 3pm; check out 12pm
- For more information about the hotel and its accommodations, please visit their website at:

**[www.westin.com/peachtree](http://www.westin.com/peachtree)**

## CONFERENCE SCHEDULE (continued)

first budget items to be sacrificed when times get lean. This session will review the most common types of insurance and the importance of maintaining and prioritizing coverage when budgets are tight.

**Lance Osborne, Vice President of U.S. Field Force Development - "Aflac"**

12:30 p.m.-2:00 p.m.

### LUNCH & KEYNOTE ADDRESS

**Dan Iannicola, Deputy Assistant Secretary for Financial Education - U.S. Treasury, President's Advisory Council on Financial Literacy**

2:15 p.m.-3:30 p.m.

### SESSION IV: LESS MONEY, MORE RESULTS: THE NUTS AND BOLTS OF PROGRAM EVALUATION

In the face of decreasing fund balances, many corporations and grant makers are carefully evaluating both the effectiveness and impact of financial literacy efforts. This session will discuss methods financial educators can use to determine the effectiveness and impact of their education efforts through measurable outcomes.

**Leslie E. Linfield, Esq., Executive Director/Founder - Institute for Financial Literacy**

3:30 p.m.-3:45 p.m.

### BREAK

3:45 p.m.-5:00 p.m.

### SESSION V: LOOKING AT THE LONG TERM: BASIC INVESTMENT STRATEGIES IN DIFFICULT TIMES

As the economy weakens, many would-be investors try to wait out the storm but never get back into the habit of retirement planning. This session will discuss strategies to help clients shift to a long term view of investments, reduce downside risk, and firmly commit to their retirement plans.

**Sam Goller, Director of Marketing - Stowers Innovations**

**Scott Oberkrom, Corporate Community Investments Consultant - American Century Investments**

## Friday, September 12

8:00 a.m.-8:45 a.m.

### CONTINENTAL BREAKFAST

9:00 a.m.-10:15 a.m.

### SESSION VI-A: TECHNOLOGY AND TECHNIQUES OF FINANCIAL EDUCATION

Financial educators serve a diverse range of clients and students, each with different needs, priorities and abilities. As the economy changes, educators need to find the most effective ways to reach their audience. This session will focus on the experience of the panel and discuss the effectiveness of various technologies.

**Ammar Askari, Community Education Administrator - M & I Marshall & Ilsley Bank**

**Daniel James Enga, Director of Education - Auriton Solutions**

**Russell Graves, Executive Director - Consumer Credit and Budget Counseling**

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

### BREAK

10:30 a.m.-12:00 p.m.

### SESSION VI-B: TECHNOLOGY AND TECHNIQUES OF FINANCIAL EDUCATION Panel

12:00 p.m.-12:15 p.m.

### CLOSING REMARKS

#### ALSO AT THE CONFERENCE:

## 2ND ANNUAL EIFLE AWARDS EXCELLENCE IN FINANCIAL LITERACY EDUCATION

The Excellence In Financial Literacy Education Awards™ were created to acknowledge innovation, dedication and the commitment of those supporting financial literacy education. The EIFLE Awards are presented each year at the Annual Conference on Financial Education in the following 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 2007 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.

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