

Summit on Financial Education
Friday, October 21, 2011 8:30am – 3:30pm
Connolly Ctr, Federal Reserve Bank of Boston



**Massachusetts Financial
Education Collaborative**

Building on a Wealth of Knowledge

Agenda

8:30 a.m. Breakfast and Networking

9:00 a.m. Welcome and Introductions

- *Kenneth Montgomery, First Vice President/COO, Federal Reserve Bank of Boston*
- *Proclamation of October as Financial Education Month - Barbara Anthony, Undersecretary, Mass Office of Consumer Affairs and Business Regulation*
- *Recent MFEC accomplishments- Kathy Tullberg, Massachusetts Community & Banking Council*
- *Announcement: Opening the MFEC's statewide office of financial education- Susanne Cameron, Citi Community Development*
- *Brief remarks – Steve Grossman, Massachusetts Treasurer & Receiver General*

9:40 a.m. The CFPB: The Division of Consumer Education and Engagement

Gail Hillebrand, Associate Director of Consumer Education and Engagement, US Consumer Financial Protection Bureau, Washington, D.C.

10:20 a.m. Video: Faces of Financial Education

Life Skills Productions

10:30 a.m. BREAK

10:40 a.m. Breakout Session: Charting Our Course: Next Stop MFEC

- *K-16 (New England Center), Facilitator: David Floreen, Mass Bankers*
- *Adult (Connolly Center), Facilitator: Aida R. Franquiz, Boston Private Bank*
- *Older Adults (Boston Room), Facilitator: Pat Walsh, Cape Cod Five*

12:00 p.m. Lunch and Networking

1:00 p.m. Breakout Session: Delivering Quality: Measuring Success, Standards, Ethics

- *K-16 (New England Center), Facilitator: Scott Guild, Federal Reserve Bank of Boston*
- *Adult (Connolly Center), Facilitator: Leanne Martin, State Treasurer's Office*
- *Older Adults, (Boston Room) Facilitator: Kathy Tullberg, Mass Community & Banking Council*

2:30 p.m. BREAK

2:45 p.m. Next Steps

- *Margaret Miley, The Midas Collaborative*
- *MaryAnn Clancy, Mass Credit Union League*

3:30 p.m. Wrap up and Adjournment

The MFEC would like to extend special appreciation to the following for their assistance in providing financial support for today's event: Federal Reserve Bank of Boston's Office of Diversity and Inclusion and Office of Regional and Community Outreach, Boston Private Bank, FDIC.

Summit Planning Committee: Scott Guild/Federal Reserve Bank, Aida Franquiz/ Boston Private Bank, Doreen Treacy/ DotWell , Daniel Galli/ Massachusetts Financial Planners Association, Anahit Tokatlyan/The Midas Collaborative.