

Program for Thursday, July 21, 2011

Continental Breakfast & Registration

8:30 a.m.

**Welcome by Rod Reed, Iowa Jump\$tart President
Finance Bureau Chief, Iowa Division of Banking**

**9:00 a.m.
Lakeview Room**

Program

What Really Works: The TS Bank Institute Financial Literacy Program

**Bob Mantell
Director, TS Bank Institute**

**9:10-9:50 a.m.
Lakeview Room**

What does a fully integrated financial education program look like for K-12? The Treynor State Bank created a unique model. Learn what's worked.

Bob Mantell is the first director of the TS Bank Institute and is building a K-12 financial literacy program for the Treynor Community School District. He has a bachelor's degree in economics from Creighton University and 20 years of corporate procurement and operations experience. Bob is also the head baseball coach at Treynor High School and resides in Treynor with his wife Kristin, sons Nolan and Grant, and daughter Quinn.

Break

9:50-10:00 a.m.

Lessons Learned at Jump\$tart's National Conference

**Teresa Nennig, Independence High School and
Rhonda Schmaltz, Ames Community Schools**

**10:00-10:40 a.m.
Lakeview Room**

Rhonda and Teresa will share their experiences and financial literacy tips they gained from the National Jump\$tart Coalition conference last November in Washington DC where they represented Iowa.

Teresa Nennig has been a Family and Consumer Sciences instructor for 35 years, with the last 15 years at Independence High School. She is active in several organizations and holds leading positions. In 2007, she was named IFCSEP Teacher of the Year and IACTE Teacher of the Year. In 2009, she was honored with IAFCS Teacher of the Year. Her goal has been to engage all learners in activities that interest them as well as help them learn needed everyday living skills.

Rhonda Schmaltz is the business teacher and department chair at Ames High School where she has taught 13 years. Her teaching responsibilities include accounting, computer applications, multimedia, desktop publishing, webpage design and financial literacy. Prior to Ames, she was a business instructor at Urbandale High School. She has worked at Iowa State University and taught evening classes at Des Moines Area Community College. Rhonda serves on the executive board and conference planning committees for the Iowa Business Education Association.

Got Privilege? The Financial Education Equalizer

Samy El-Baroudi, 2010 Iowa Jump\$tart Financial Educator of the Year

**10:40-11:20 a.m.
Lakeview Room**

This session will discuss the use of financial literacy education as an equalizer for students from lower socio-economic households. It will focus on the repetitive nature of poverty and strategies to teach students to break the cycle.

Samy El-Baroudi has taught business classes 14 years at Des Moines' East High School, one of the largest school districts in the state. He also teaches business and education classes for Upper Iowa University where he previously earned his bachelor's degree. He also received an MBA from the University of Phoenix.

Workshop (Concurrent sessions, choose 1)

Topic: *New Ideas Using NEFE's High School Financial Planning Program*

Presenter: **Mary Beth Kaufman**

Resource Management Specialist, Iowa State University Extension

11:20- noon

Maple Room

Whether you are a seasoned or "new" user of the High School Financial Planning Program, this session will help you discover new resources and activities to supplement the curriculum and meets the requirements of the Iowa Core 21st Century financial literacy skills.

Mary Beth Kaufman has worked for Iowa State University Extension for 30 years teaching financial management skills to youth and adults in a 10 county area in SW Iowa. She serves as the statewide coordinator for the NEFE High School Financial Planning Program and is an active member of the Iowa Jump\$tart Coalition. Mary Beth holds a bachelor's and master's degree from Iowa State University in family and consumer sciences education.

Topic: **New Ideas Using the *MoneySKILL*® Curriculum**

Presenter: **Jessie Palmer**

Iowa State University

Oak Room

MoneySKILL is a free online course that teaches personal finance concepts on income, expenses, saving and investing, credit and insurance to students. Teachers can select specific modules for their students' course of study. Students can access the modules anywhere they have access to the Internet. MoneySKILL is constantly updated based on teacher suggestions. The workshop will illustrate features to register and enroll students, electronic grade book, modules selection, ordering and retaking, importing class roster and generating a completion certificate. The newly released middle school version will be previewed.

Jessie Palmer obtained her degree in Family and Consumer Sciences Education and Studies from Iowa State University in 2011. She is an active member of AAFCS and IAFCS.

Exhibits

11:30 a.m. – 2:00 p.m.

Walnut Room

Don't miss the exhibit area—it's packed with free curriculum and other educational materials! Please feel free to take one sample of materials made available, however, realize that other attendees will also want samples. If you see something you want in quantity for a class, please ask the exhibitor about providing those for that purpose.

Lunch

Planning Your Financial Life

Adam Carroll

Noon

Lakeview Room

Our psychology and feelings around money are very individual and very private, yet ALL of us will be faced with money decisions throughout our life that will help shape who we are, what we experience, and how well we live. Learn the key distinctions necessary to live a well-planned financial life -- one that allows you to work, travel, play, and ultimately retire with dignity.

Adam Carroll is founder of National Financial Educators and co-author of *Winning the Money Game*. As a guest lecturer at hundreds of colleges and universities, his programs have been seen by more than 150,000.

Special Guests

The Honorable Terry Branstad, Governor of Iowa, and Kim Reynolds, Lt. Governor

Governor Branstad is Iowa's longest-serving governor, serving from 1983-1999 and re-elected in 2010. A native of Leland and graduate of Drake University law school, Branstad was elected to the Iowa House in 1972, 1974 and 1976, and elected lieutenant governor in 1978. After serving Iowa, Branstad became president of Des Moines University where he grew the institution into a world-class educational facility. He and his wife have three children and four grandchildren.

Kimberly (Strawn) Reynolds is a native of St. Charles and was elected Clarke County Treasurer in 1994 and re-elected in 1998, 2002 and 2006. She took an active role as president of the Iowa State Treasurers Association, continued statewide leadership through a three-person policy team, and was named "Outstanding County Treasurer in the United States." She was elected to the Iowa Senate in 2008. She and her husband have three children and four grandchildren.

Break

1:50-2:00 p.m.

Opportunities for Your Classroom: Iowa Financial Literacy Program

Cody Lycke, EverFi, and

Nancy Ankeny, Iowa College Student Aid Commission

2:00-2:45 p.m.

Lakeview Room

Nancy Ankeny is associate director of outreach at the Iowa College Student Aid Commission. She works with Iowa's educators and school counselors to help them integrate I Have A Plan Iowa™, the state's designated career information system, and the Iowa Financial Literacy Program. Nancy joined Iowa College Aid in November 2006 as a Communications Specialist until assuming her current role in March 2008. From 1998-2006, Nancy served as an outreach representative for the College Planning Center, and she was a graduate assistant for Drake University's financial aid office from 1997-1998. Nancy received a Bachelor of Arts Degree in Psychology from the University of Iowa and a Masters Degree in Public Administration from Drake University.

Cody Lycke is director of Midwestern operations at EverFi, an education technology company, building and operating the nation's largest network for K-12 online education in areas such as financial literacy, student loan management and other life skills. EverFi teams with major corporations as well as community banks to provide the program at no cost to the schools. He was raised in a small town in central Iowa and later attended Upper Iowa University where he received his diploma in Communications, graduating with honors.

Workshop 2 (Concurrent sessions, choose 1)

Topic: *Cashing In on Good Credit*

Presenter: **Brian Zitlow**

Major Account Executive, TransUnion

2:45-3:30p.m.

Lakeview Room

This presentation will discuss what's in a credit report and where the data originates; what is a credit score and how lenders use it; financial impacts of poor credit and how to improve your score; and how to protect yourself from several types of fraud.

Brian Zitlow manages large customer relationships in Kansas, Nebraska, Iowa, and Missouri for TransUnion, a national credit bureau that provides credit data and identity verification tools. He has facilitated seminars and training sessions on such topics as compliance with the Fair Credit Reporting Act, credit scoring, and how to understand your credit report. Brian has held several positions in non-profit organizations that promote the education of consumers and credit professionals, including Iowa Jump\$tart Coalition, Association of Credit Executives, and American Collectors Association.

Topic: *Ultimate Money Skills*
Presenter: **Sean Brown**
Consumer Marketing Manager, Bank of America

Maple Room

This presentation will focus on financial responsibility and developing money skills.

Sean Brown is in charge of Bank of America's banking centers in Iowa and Kansas. He previously worked in Houston, TX, where he started a new bank and grew the company to two locations. Sean attended Brigham Young University in Utah. He is married and has four young boys.

Topic: *Keeping Your Financial Ship Afloat in an Unstable Economy*
Presenter: **Jim Garnett**
Consumer Credit of Des Moines

Oak Room

Jim Garnett is the "Mr. G." behind the *AskMrG* Library, and he has more than 30 years experience as a counselor, speaker, and author. He serves as director of education for Consumer Credit of Des Moines, on the board of directors for the Iowa Jump\$tart Coalition, and on the board of educational advisors for the Institute of Consumer Financial Education. He is a nationally certified credit counselor and parent trainer, and he has authored seven books on financial management and family counseling. His booklet, "How To Have Money With The Money You Have," is approved by the U.S. Bankruptcy Trustees as a tool for financial education.

Closing Session
Money Habitudes: How to Be Rich in Life and Love
Syble Solomon

3:30-4:30 p.m.
Lakeview Room

This session introduces the human side of money – the subconscious factors that dictate how we actually relate to money regardless of financial skills or economic status. This information is an important precursor to financial literacy courses. It helps teens identify their personal financial patterns, reveal how these affect their goals and relationships, and discover ways to use this knowledge to be more successful.

Syble Solomon is a popular speaker on the psychology of money. She is the founder of LifeWise and in 2003 created Money Habitudes™ based on research in finance, psychology and behavioral economics. Syble developed the Money Habitudes™ cards to be a multi-sensory tool to appeal to different learning styles and abilities based on her experiences as an educator for 25 years. As an executive coach, Syble has been affiliated with the Center for Creative Leadership since 1995. She works with corporate executives, leaders of non-profits, government agencies, the military, and educators in leadership programs with selected states and school districts.

Thanks for Coming!

The mission of the Iowa Jump\$tart Coalition is to improve financial literacy of Iowans. We hope you will provide a classroom venue for financial education. To get details about other Coalition activities and to keep in touch with us throughout the year, check www.iowajumpstart.org.

Registration and Information

Headquarters for the Conference will be located at the registration table. Members of the Iowa Jump\$tart Coalition will be on hand to answer questions, and a message board is located there. Should someone need to reach you during the Conference, the number is 515-964-6655.

Cellular Phones and Pagers

To respect attendees and presenters, kindly turn off cell phones and electronic devices during workshops and general sessions.

Conference Highlights and Photos

Upon your return home, check for conference photos at www.iowajumpstart.org!

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Iowa Insurance Division Investor Education Fund
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Iowa Jump\$tart Coalition Members

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