



Financial Education and Asset-Building Opportunities
Friday, October 1, 2010, 9:00 a.m. to 1:30 p.m.
Federal Reserve Bank of Philadelphia, Pennsylvania Room
Agenda

- 8:30 a.m. – 9:00 a.m. **Registration and Continental Breakfast**
- 9:00 a.m. – 9:05 a.m. **Welcome**
*Dede Myers, Vice President and Community Affairs Officer,
Federal Reserve Bank of Philadelphia*
- 9:05 a.m. – 9:10 a.m. **Meeting Purpose**
*Donald L. Haskin, Senior Vice President, Pennsylvania State Director,
Community Development, Citi, Philadelphia*
- 9:10 a.m. – 10:30 a.m. **Financial Education and Asset Building: What Works and Issues and Challenges**
*Lauren E. Leimbach, Executive Director, Community Financial Resources,
Berkeley, CA; and John Thompson, Senior Vice President and Co-Founder,
ADVENTafs, Kansas City, MO*
*Moderator: Patricia A. Hasson, President, Consumer Credit Counseling
Service of Delaware Valley, Inc., Philadelphia*
- 10:30 a.m. – 10:45 a.m. **Break**
- 10:45 a.m. – 12:15 p.m. **New Financial Education and Asset Building Strategies at Volunteer Income Tax Assistance (VITA) Sites**
*James K. Daugherty, Territory Manager for Pennsylvania, Stakeholder
Partnership Education and Communication, Internal Revenue Service,
Pittsburgh; and Sara Johnson, Director, Baltimore CASH Campaign*
*Moderator: Khadijah Jones, Director, Campaign for Working Families,
Urban Affairs Coalition, Philadelphia*
- 12:15 p.m. – 12:30 p.m. **Meeting Summary**
*Donald C. Kelly, Director of Community and Economic Development,
Urban Affairs Coalition, Philadelphia; and Anthony Davis, Managing Partner,
The Davis Financial Group, LLC, Elkins Park, PA*
- 12:30 p.m. – 12:35 p.m. **Closing Remarks**
*Dede Myers, Vice President and Community Affairs Officer,
Federal Reserve Bank of Philadelphia*
- 12:35 p.m. – 1:30 p.m. **Lunch**