



**Massachusetts Financial  
Education Collaborative**

*Building on a Wealth of Knowledge*

## Summit on Financial Education

**October 28, 2009**

**Federal Reserve Bank of Boston**

### **AGENDA**

**9:00 a.m. Continental Breakfast & Networking**

**9:30 a.m. Welcome & Introductions**

*Richard Walker, Vice President, Public & Community Affairs,  
Federal Reserve Bank of Boston*

*Timothy Cahill, Massachusetts State Treasurer & Receiver General*

*Barbara Anthony, Undersecretary, Massachusetts Office of Consumer Affairs  
And Business Regulation*

#### **The Massachusetts Financial Education Collaborative**

- **Mission**

*Susanne Cameron, Citi*

- **Working Groups**

*Margaret Miley, The Midas Collaborative*

- **Related Initiatives**

*Leanne Martin, Office of The State Treasurer & Receiver General*

- **Progress to Date**

*David Floreen, Massachusetts Bankers Association*

- **Today's Objectives**

*Kathleen Tullberg, Massachusetts Community & Banking Council*

**10:00 a.m. Breakout Sessions: Program Information, New Ideas for Coordination and Delivery**

- **Financial Education for K-16**

*Meeting location: Boston Room*

*Facilitators: Scott Guild, Federal Reserve Bank of Boston*

*David Floreen, Massachusetts Bankers Association*

*Panelists: Dr. Margaret Brooks, Massachusetts Council on Economic Education, Bridgewater State College*

*Shauntell Foster, DotWell CivicHealth Institute*

*Devlin Man, UMass Amherst Financial Literacy Project*

*Senator Susan C. Tucker, Chair, Committee on Housing*

- **Financial Education for Adults**

*Meeting location: New England Room*

*Facilitators: Leanne Martin, Office of the Treasurer*

*Margaret Miley, The Midas Collaborative*

*Panelists: Deborah Maloy, Financial Planning Association of Massachusetts*

*Doreen Treacy, DotWell CivicHealth Institute*

*Jameel Webb-Davis, Start Money Smart, Inc.*

- **Financial Education for Seniors**

*Meeting location: Conference Room A*

*Facilitators: Dana Ansel, MassINC*

*Dick Hylan, North Shore Elder Services*

**12:30 p.m. Luncheon**

**1:30 p.m. New Ideas and Next Steps**

- **Reports from the Breakout Sessions**

- **Discussion**

*Facilitator: Aida Franquiz, Boston Private Bank & Trust Company*

- **Next Steps**

*Kathleen Tullberg, Massachusetts Community & Banking Council*

**3:00 p.m. Adjournment**

The Massachusetts Financial Education Collaborative wishes to thank the following organizations and institutions for their help in organizing and underwriting today's program:

Boston Private Bank  
Federal Deposit Insurance Corporation  
Federal Reserve Bank of Boston  
Marzi Design, Inc.  
Massachusetts Bankers Association  
Massachusetts Community & Banking Council  
MassINC  
Office of the State Treasurer and Receiver General  
The Midas Collaborative