



# The Professionalizing Field of Financial Counseling and Coaching Conference

May 5, 2016

8:00 – 8:30 AM *Check-in and Breakfast*

8:30 – 8:45 AM **Welcome**

JONATHAN MINTZ, *President and CEO, Cities for Financial Empowerment Fund*

8:45 – 9:00 AM **Introductory Keynote**

BOB ANNIBALE, *Global Director, Citi Community Development and Inclusive Finance*

9:00 – 10:15 AM **Panel #1: Quality**

Facilitated by ERIK COLE, *Director, Mayor's Office of Economic Opportunity and Empowerment, City of Nashville*

- MARGARET SHERRADEN, *Founders Professor of Social Work, University of Missouri-St. Louis*
- JEANETTE TAKAMURA, *Dean, Columbia University School of Social Work*
- REBECCA WIGGINS, *Executive Director, Association for Financial Counseling & Planning Education*

10:15 – 10:30 AM *Break*

10:30 – 10:45 AM **Morning Keynote: Community**

MICHAEL SHERRADEN, *George Warren Brown Distinguished University Professor, Director, Center for Social Development, Washington University in St. Louis*

10:45 – 12:00 PM **Panel #2: Accountability**

Facilitated by ADAM FAIR, *Director of Programs, Prosper Canada*

- J. MICHAEL COLLINS, *Faculty Director, Center for Financial Security at the University of Wisconsin, Madison*
- GREGORY ELDERS, *Bloomberg Intelligence ESG Analyst, Bloomberg LP*
- RANDY HANNAN, *Chief of Staff, Mayor's Office, City of Lansing*

12:00 – 12:30 PM *Lunch*

12:30 – 1:00 PM **Lunchtime Keynote: Reflections on Professionalism from the Housing Counseling Field**

SARAH GERECKE, *Deputy Assistant Secretary for Housing Counseling, U.S. Department of Housing and Urban Development*

1:00– 2:15 PM

### Panel #3: Consistency

Facilitated by SARAH BAINTON KAHN, *Policy Analyst, Office of Financial Empowerment, Consumer Financial Protection Bureau*

- ASAPH GLOSSER, *Senior Research Associate, MEF Associates*
- MAE WATSON GROTE, *Founder and Executive Director, The Financial Clinic*
- SEUNG KIM, *Program Director, Family Income & Wealth Building, Local Initiatives Support Corporation*

2:15– 2:25 PM

### Recent Research Results: Asset Funders Network Financial Coaching Census

HALLIE LIENHARDT, *Outreach Specialist, Center for Financial Security at the University of Wisconsin, Madison*  
REGINA SALLIEY, *Program Associate, the Annie E. Casey Foundation*

2:25– 2:30 PM

### Closing Remarks

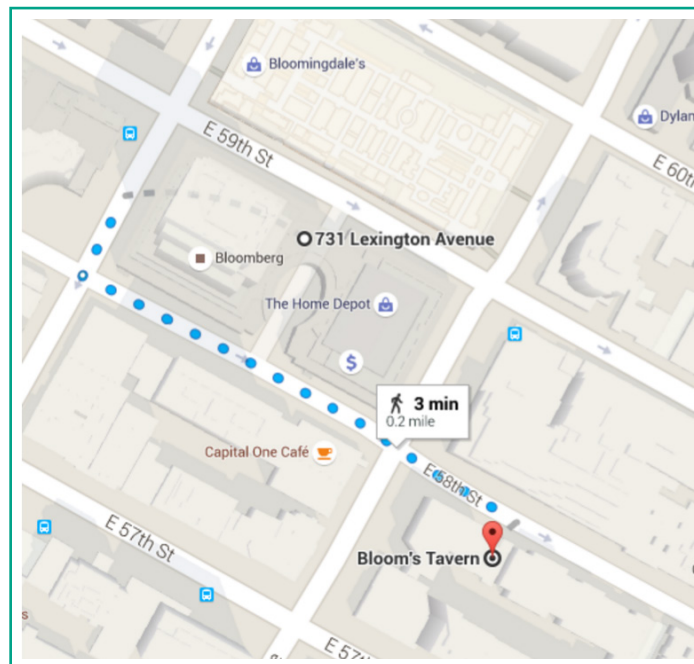
JONATHAN MINTZ, *President and CEO, Cities for Financial Empowerment Fund*

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**Continue the Conversation: join us at a reception immediately following the Conference!**

Bloom's Tavern, 208 East 58<sup>th</sup> Street (between 2<sup>nd</sup> Avenue and 3<sup>rd</sup> Avenue)

2:30 – 5:00 PM



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