

## 4<sup>th</sup> Annual, Financial Literacy Act 48 Accredited Program

### CFA Society Pittsburgh & The Missing Semester

Date: Thursday March 8<sup>th</sup>, 2018  
 Time: 8:30 – 12:00  
 Location: Allegheny Intermediate Unit  
 475 E Waterfront Dr,  
 Homestead PA 15120

#### Empowering and Preparing Pennsylvania's Students for the Money Choices they ALL will make

- 8:30 – 8:35**    **Program Introduction:**
- 8:35 – 9:00**    **Resource Session:** Mock Financial Planning Interview  
*Reed Natali, CFA – Shorebridge Wealth Management & CFA Society Pittsburgh*
- 9:00 – 9:40**    **Information Session:** Engaging Parents Early: How Financial Literacy Can Improve College Planning  
*Kimberly McCurdy, PHEAA*  
*Wendy Dunlap, PHEAA*
- 9:45 – 10:15**    **Information Session:** The Importance of High School Financial Literacy Education  
*Dina Muth, La Roche College & CFA Society Pittsburgh*
- 10:15 – 11:00**    **Resource Session:** Teacher “Potluck” (sharing of ideas, resources, etc.)  
*Mike Palano, North Hills High School*  
*Jordan Langue, North Allegheny High School*
- 11:00 – 11:30**    **Information Session:** Saving for College with the PA 529 College Savings Program  
*Kelly Davis, PA State Treasurers Office*
- 11:30 – 12:00**    **Information Session:** Making Saving Possible (for every student)  
*Eugene M. Natali, Jr. CFA Society Pittsburgh & The Missing Semester*
- 12:00 – 12:15**    **High School Profile:** Fact Sheet Presentation of Year-2 survey results  
*Jason Pettner, Penn State Behrend*
- 12:15 – 12:30**    **Wrap Up**

