4th Annual, Financial Literacy Act 48 Accredited Program

CFA Society Pittsburgh & The Missing Semester

Date: Thursday March 8th, 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