



2021 Texas Financial Literacy Summit

July 27-28, 2021 | Presented Virtually



TexasBankersFoundation



Texas Financial Literacy Summit

The Texas Bankers Foundation in collaboration with the Texas Jump\$tart Coalition invite you to attend the 2021 Texas Financial Literacy Summit. Held virtually, this program is designed to help bankers and teachers exchange ideas, share practical education tips and business literacy success stories.

Celebrating its 14th year, the Texas Financial Literacy Summit will feature a top-notch lineup of bankers, educators, regulators and policy specialists to discuss practical financial education initiatives, business literacy programs and successful community bank partnerships that are making a difference in our Texas communities.

July 27, 2021

9:00 a.m.

Welcome

Texas Commissioners discuss the business case for supporting a financially fit citizenry in Texas and how educators play an important role.

*Commissioner Caroline Jones, Savings and Mortgage Lending
Commissioner Leslie Pettijohn, Office of Consumer Credit*

9:10 a.m.

Keynote Address

Chris Furlow interviews Texas Comptroller Glenn Hegar to discuss how educators can collaborate with businesses to create a financially fit Texas.

*Glenn Hegar, Texas Comptroller of Public Accounts
Moderator: Chris Furlow, TBA President & CEO*

9:30 a.m.

Financial & Business Literacy Workshops

Unity National Bank showcases its one-hour workshops with public/private partners for area small businesses that focus on financial and business literacy.

*Sheri Lawal-Price, Unity National Bank
Moderator: Michele Carfello, Texas Bankers Association*

10:00 a.m.

Community Bank Collaborations

Texas Security Bank and Comerica Bank highlight its collaboration with local small businesses and entrepreneurs to support financial education and business literacy.

TBD

10:30 a.m.

Bank On Guiding Principles

Cities for Financial Empowerment Fund discusses its Bank On platform and explores why everyone needs an account in a post COVID-19 workplace.

David Rothstein, Cities for Financial Empowerment Fund

11:00 a.m.

Household Use of Banking and Financial Services

Dive into results from the recent FDIC survey on Household Use of Banking and Financial Services in Texas and learn how educators can use this research in the classroom.

Linda Gabriel, Federal Deposit Insurance Corporation

11:30 a.m.

Lemonade Day Career Success

Hear from Emilee Sinner about her career path, from Lemonade Day entrepreneur to intern/coach for younger kids and now an employee of The First National Bank of Texas.

Emilee Sinner, First National Bank Texas, Killeen

12:00 p.m. **Wrap-up and Adjournment**

July 28, 2021

9:00 a.m.

Welcome

Celebrate the passage of SB 1063 allowing school districts the ability for students to earn the third required credit for social studies with either Economics or the new course, Personal Financial Literacy and Economics.

9:15 a.m.

Tools and Resources for Educators and Bankers

Learn about building scaleable/successful small businesses as well as ready tools provided by financial educators, community organizations and bank partnerships.

Community and Bank Partnerships – CDFIs and CDCs

What can we do together? Resources that exist in both established and new CDFIs and CDCs.

*Janie Barrera, LiftFund
James McGee, Southern Dallas Progress
John Gosser, Advance Community Fund
Moderator: Brent Cox, Texas Bankers Association*

9:45 a.m.

Banker/Regulator Panel

Highlights of banking/community partnership programs that are helping communities and earning investment and service credit.

*Scarlett Duplechain, Office of Comptroller of the Currency
Effie Dennison & JJ Ponce, Texas Capital Bank, Dallas*

10:15 a.m.

ABA Financial Literacy Programs

ABA shares insight on ABA Financial Literacy programs including Teach Children to Save, Get Smart About Credit and Lights, Camera & Save. Plus, FNB Shiner will discuss submission of a winning Lights, Camera & Save video.

*Jeni Pastier, ABA Foundation
Maria Jaime, First National Bank of Shiner*

10:45 a.m.

Building Financial Capacity Coalition

Members of the Coalition will share their grassroots approach to building financial sustainability in South Texas. Partnering with school districts and banks, the Coalition is addressing the financial literacy resource needs of Brownsville and the rural communities in Cameron to build financial sustainability in these communities.

*Bertha Garza, BFCC Executive Director
Erika Sikes, BISD Lead CTE Administrator & Board Member
Veronica Torres, LFISD Assistant Superintendent
Marvie Garcia, Lone Star National Bank Commercial Lender & BFCC Treasurer
Karen Pena, IBC Bank Officer & BFCC Secretary*

11:15 a.m.

Millionaire Club

Learn about the webinar series with a budgeting simulation based on real life that features a one-hour Zoom session as well as tasks to complete their budget and a reflection journal.

Angela Delamar, TEA ESC-1

11:45 a.m.

The Missing Last Semester/The Missing Second Semester

Award-winning author Gene Natali discusses key elements from his books, "The Missing Last Semester" and "The Missing Second Semester," and how the choices we make every day have financial consequences.

Gene Natali, CFA

12:15 p.m. **Wrap-up and Adjournment**

Thank you to our sponsors!



Texas Financial Literacy Summit

July 27-28, 2021



REGISTRATION

BANKERS REGISTER ONLINE AT WWW.TEXASBANKERS.COM/STORE

Mail: Texas Bankers Association • P.O. Box 2569 • Austin, Texas 78768-2569

Email: register@texasbankers.com • Fax: 512-473-2560 • Phone: 800-462-7295

Questions? Call 512-472-8388 or email jocelyn@texasbankers.com

Registration/Cancellation

Register your bank for the flat fee of \$395, and this year educators can register for FREE!

Summit registrants will receive an email approximately 24-48 hours before the start of the conference with instructions on accessing the virtual event platform. The email will include a unique link to join the meeting. Substitutions of registered attendees are welcomed but must be made by emailing jocelyn@texasbanker.com.

Registration refunds are not available.

One Fee, Unlimited Attendees (per organization)

Banker: \$395 Educator: FREE

Bankers may register online at www.texasbankers.com

Educators should email their registration form to jocelyn@texasbankers.com

MAIN REGISTRANT

Name Mr. Ms.

Title Bank or School

Street Address City, State, Zip

Mailing Address (if different from above) City, State, Zip

Phone Email Address

Grade Level (Educator Only) Personal Email Address (Educator Only)

To expedite your registration, please include any other names you have used (i.e. maiden name, formal name or nickname) and, if applicable, any other financial institutions you have previously worked for.

Other Names Other Financial Institutions

ADDITIONAL PARTICIPANTS

(NO ADDITIONAL FEE REQUIRED)

First Name Mr. Ms. Last Name Email

First Name Mr. Ms. Last Name Email

First Name Mr. Ms. Last Name Email

First Name Mr. Ms. Last Name Email

First Name Mr. Ms. Last Name Email

First Name Mr. Ms. Last Name Email

Please complete and mail with check to:

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800-462-7295 / 512-472-8388 phone
512-473-2560 fax