

# MassSaves

## Financial Education Summit



Friday, April 28, 2017 • 9:00am-4:00pm • Worcester State University, 486 Chandler Street, Worcester

**9-9:30am**

Registration and Networking

**9:30-9:40am**

Welcome by MassSaves

**9:45-10:15am**

Massachusetts State Treasurer Deborah B. Goldberg

**10:15-10:35am**

The State of Financial Education

**10:45am-12:15pm**

Concurrent Breakout Sessions:

1. College Planning and Success

- Ruth Carrigan, Whitman-Hanson Regional High School
- Keenen Grooms, Massachusetts Treasurer's Office
- Clantha McCurdy, Massachusetts Department of Higher Education
- Moderator: Dave Floreen, MassSaves Steering Committee Member

2. Financial Education Resources and Tips for the Classroom and at Home

- Scott Guild, Massachusetts Council on Economic Education
- Lydia Nelson, Whitman-Hanson Regional High School
- Matt Paradise, American Consumer Credit Counseling, Jump\$tart Coalition

3. How Financial Coaching and Planning Can Impact Your Financial Future

- Susan Wolfson, The Midas Collaborative
- John McAvoy, Financial Planning Association of Massachusetts (FPAMA)

**12:30-1:15pm**

Lunch

**1:20-1:45pm**

Keynote Speaker: Beth Kobliner, Journalist and New York Times Bestselling Author

**2-3:15pm**

Building a Financially Capable Massachusetts through Advocacy Panel

- Charles Desmond, Inversant
- Aida Franquiz, Boston Private Bank
- Jennifer Kinsman, United Way of Pioneer Valley
- Steve Lowell, Monson Savings Bank
- Moderator: Pam Hoffman, The Midas Collaborative

**3:20pm**

Closing

**ABOUT MASSSAVES:** MassSaves provides financial education, resources and advocacy for individuals and families looking to achieve financial stability and build wealth. MassSaves is a broad network of public and private stakeholders including financial educators, providers, community organizations and advocates. MassSaves is an initiative of [The Midas Collaborative](#), a statewide nonprofit organization that advances the financial security of low and moderate income families in collaboration with member and partner organizations.



[www.MassSaves.org](http://www.MassSaves.org)



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