



## General Partners' Meeting

*Welcome Back to In-Person!*

September 1, 2022

### Agenda

Hyatt Regency Washington on Capitol Hill — Regency CD Room  
Continental Breakfast and Financial Literacy Resource Tables at 8:30 a.m. ET

**A. Welcome and Opening Remarks (9:00-9:15 a.m.)**

Laura Levine, President and CEO.

Corey Carlisle, JumpStart National Board Chairman.

**B. Current Issues in Investor Education: Crypto-Assets, ESG, and Social and Digital Communication (9:15-10:00 a.m.)**

Presentation by Owen Donley, Chief Counsel, Office of Investor Education and Advocacy, United States Securities and Exchange Commission.

**C. Break (10:00-10:15 a.m.)**

**D. Panel: The Road to Financial Inclusion (10:15-11:00 a.m.)**

- Thomas Foley, Executive Director, National Disability Institute;
- Monica Mitchell, Vice President/Social Impact, Wells Fargo & Company;
- Stefanie Steward-Young, Senior Vice President, Chief Corporate Social Responsibility Officer, Fifth Third Bank;
- Jinhee Kim, Ph.D., Professor and Assistant Director, Family & Consumer Sciences Program Leader, University of Maryland at College Park (Moderator).

**E. Group Discussions: Sharing JumpStart Partner Initiatives (11:00-11:45 a.m.)**

John Doyle, Partner, Doyle McDonald, LLC, will facilitate discussion groups with Partners and State Coalition Leaders to share current financial literacy efforts and collaborate on ways to increase financial inclusion.

**F. Announcements and Conclusion (11:45 a.m.-12:00 p.m.)**

**Exhibit at #JumpstartNEC**

Are you registered to exhibit at this year's National Educator Conference in Atlanta? Visit [jumpstart.org/2022-nec](http://jumpstart.org/2022-nec) for more information. The Exhibit Hall is filling up fast!

*Please join us for our annual **JumpStart Awards Luncheon** from 12:30-2:30 p.m. in the Regency A Room.*

*And, take advantage of our JumpStart Photo-Op Wall for a fun group picture or selfie! Tag*

***@NatlJumpStart** (Twitter and Facebook) using hashtags: **#FinancialLiteracy** and*

***#FinancialSmartsForStudents**.*