



## Educator Webinar

January 24, 2018

Topic	Speaker(s)
Webinar Overview and Instructions	Hilary Hunt
Keys to Financial Success: New Online Teacher Training Program	Andrew Hill
Robo Advising, Savings Apps, and Students - Oh My!	Hilary Hunt
How Penn State is Tackling Financial Education for College Students	Brad Yeckley
Wrap Up and Evaluation Instructions	Hilary Hunt

## Mark Your Calendars for the Next Webinars: February 28th - afternoon and evening

### What Teens Should Understand about Taxes

*Holly Chase, Pennsylvania Housing Finance Agency*

### The NEFE High School Financial Planning Program

*Susan Sharkey, National Endowment for Financial Education*

### High School Credit Union Branches: What They Are and How to Start One

*Kathleen Fey, Pennsylvania Credit Union Foundation & Randi Marmer, TruMark Federal Credit Union*

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## Making Cents: Financial Literacy and Economic Education for Pennsylvania Teachers Webinar – January 24, 2018

### Links from the Presentations

From Andrew's Presentation:

Federal Reserve Bank of Philadelphia - Education

<https://www.philadelphiafed.org/education>

Keys to Financial Success

<https://www.philadelphiafed.org/education/teachers/resources/keys-to-financial-success>

From Hilary's Presentation:

Robo Advisors:

- Betterment: <https://www.betterment.com/>
- Charles Schwab Intelligent Portfolio: [https://www.schwab.com/public/schwab/investment\\_advice/intelligent\\_portfolios](https://www.schwab.com/public/schwab/investment_advice/intelligent_portfolios)
- Ellevest: <https://www.ellevest.com/>
- Motif: <https://www.motifinvesting.com/>
- Personal Capital: <https://www.personalcapital.com/>
- Sigfig: <https://www.sigfig.com>
- Vanguard Personal Advisor Service: <https://investor.vanguard.com/financial-advisor/financial-advice>
- Wealthfront: <https://www.wealthfront.com/>
- Wealthsimple: <https://www.wealthsimple.com>
- Wise Banyan: <https://www.wisebanyan.com/>

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### Savings Apps:

- Acorns: <https://www.acorns.com/>
- Chime: <https://www.chimebank.com/>
- Clarity Money: <https://claritymoney.com/>
- Digit: <https://digit.co/>
- Dobot: <https://www.mydobot.com/>
- Qapital: <https://www.qapital.com/>
- Rize: <https://rizemoney.com/>
- Stash: <https://www.stashinvest.com/>

### Reviews and Other Resources

- BankRate
  - Robo-advisers: How the future looks for investors and why you should care  
<https://www.bankrate.com/finance/investing/robo-advisers-future-of-financial-advice.aspx>
  - Should you trade your financial adviser for a robo-adviser?  
<https://www.bankrate.com/finance/investing/trade-financial-adviser-for-robo-adviser.aspx>
  - Better ask these 5 questions before picking a robo-adviser  
<https://www.bankrate.com/finance/investing/ask-these-questions-before-picking-robo-adviser.aspx>
- Investopedia
  - What is a Robo-Advisor  
<https://www.investopedia.com/terms/r/roboadvisor-roboadvisor.asp>
  - Pros and Cons of Using a Robo-Advisor  
<https://www.investopedia.com/articles/personal-finance/010616/pros-cons-using-roboadvisor.asp>
  - 5 Robo-Advisors for 2018  
<https://www.investopedia.com/tech/top-robo-advisors/>
  - Rise of the Robo Advisor (video)  
<https://www.investopedia.com/video/play/rise-robo-advisors/>

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- Napkin Finance - Robo Advisors  
<https://napkinfinance.com/napkin/robo-advisors/>
- NerdWallet (also has reviews of specific apps)
  - What Is a Robo-Advisor and Is One Right for You?  
<https://www.nerdwallet.com/blog/investing/what-is-a-rob-o-advisor/>
  - How to Choose the Best Robo-Advisor for You  
<https://www.nerdwallet.com/blog/investing/how-to-choos-e-rob-advisor/>
  - Are Robo-Advisors Better Than Target Date Funds?  
<https://www.nerdwallet.com/blog/investing/robo-advisors-vs-target-date-funds/>
  - Best Robo-Advisors: 2018 Top Picks  
<https://www.nerdwallet.com/blog/investing/best-rob-advisors/>
  - Best Money Saving Apps  
<https://www.nerdwallet.com/blog/banking/best-money-sa-ving-apps/>

From Brad's Presentation:

Penn State's Financial Literacy & Wellness Center  
<https://financialliteracy.psu.edu/>

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**As a result of this webinar – I want to...**

Further Investigate:

Contact:

Talk to X about Y:

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### Speaker Biographies

#### Andrew Hill, PhD

[andrew.hill@phil.frb.org](mailto:andrew.hill@phil.frb.org)

Andrew Hill is the economic education advisor at the Federal Reserve Bank of Philadelphia and adjunct professor of economics at Temple University. Andrew earned his B.S., M.A., and Ph.D. in economics from the University of Delaware. Prior to joining the Reserve Bank in 2002 as economic education specialist, he was visiting assistant professor of economics at Washington College in Chestertown, MD. In the college classroom, Andrew has taught principles of economics, labor economics, environmental and natural resource economics, and a seminar in writing economics for senior economics majors.



Andrew is a member of the American Economic Association, the National Council for the Social Studies, and the National Association of Economic Educators, and a 2001 recipient of the University of Delaware Excellence in Teaching Award. In 2012, Andrew received both the Bessie B. Moore Service Award from the National Association of Economic Educators and the University of Delaware Presidential Citation for Outstanding Achievement. Andrew is acting president of the Pennsylvania Jump\$tart Coalition, a member of the executive board of the National Association of Economic Educators, a Leadership Philadelphia fellow, a former member of the board of directors of the Pennsylvania Economic Association, past chair of the Federal Reserve System's economic educators workgroup, and past chair of the Federal Reserve Bank of Philadelphia diversity council. In 2004, Andrew was a participant in the National Council on Economic Education's Training of Writers program in St. Petersburg, Russia. Andrew served as a member of the writing committees for the National Standards for Financial Literacy and Focus: Middle School World History and is a contributor to High School Economics, 3rd Edition. From 2011 to 2013, Andrew served as a member of the Pennsylvania Task Force on Economic Education and Personal Financial Literacy Education.

Andrew has published articles in the International Handbook of Financial Literacy, International Review of Economics Education, Perspectives on Economic Education Research, Journal of Consumer Education, Social Education, and Social Studies and the Young Learner, and numerous lessons for use in the K-12 classroom. Andrew is a frequent presenter on economic and personal financial education topics at national and state education conferences.

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### **Brad Yeckley**

[bly106@psu.edu](mailto:bly106@psu.edu)

Brad Yeckley is the Assistant Director of Financial Literacy and Wellness for The Pennsylvania State University. He is a Penn State Alumni, and has a BS in human development, an MBA in corporate finance, and is wrapping up his PhD in Workforce Education HRD/OD. He has professional experience in personal and business investment planning as a licensed investment adviser. He is a member of Penn State Emerging Leaders, sits on the Financial Literacy Advisory Board, and is also a member of the Commission on Racial and Ethnic Diversity staff committee.



Brad has received national credentialing and been recognized for his work in aid administration His dissertation focus is centered on financial literacy and its role workforce education and he is co-authoring a textbook on Organization Diagnosis Intervention Efforts. Brad is also the Vice President of a boutique consulting firm, Thrust Consulting, with a focus on asset based leadership, team and organization growth and change efforts.

### **Hilary Hunt**

[hilary@makingcentspa.org](mailto:hilary@makingcentspa.org)

Hilary Hunt is a nationally recognized education consultant with fifteen years experience in the field of financial education. Her current consulting work ranges from curriculum development to research and program evaluation. Recent clients include Pennsylvania State University, The Heinz Endowments, Investor Protection Trust, and American Bankers Association.



Hilary served as director of the Pennsylvania Office of Financial Education under Governor Edward G. Rendell from its inception in 2004 until 2009. As director, Hilary oversaw the office's initiatives to increase the availability and quality of financial education in Pennsylvania's schools, communities, and workplaces. Hilary currently serves as president of the Pennsylvania Jump\$tart Coalition and is a past member of the board of Junior Achievement of Central Pennsylvania.

Hilary began her career in education as a secondary mathematics teacher in Virginia. She moved to Pennsylvania to serve as the vice president of Program Development with Economics Pennsylvania and from there went on to work for the National Jump\$tart Coalition for Personal Financial Literacy and the Foundation for Investor Education. Hilary holds a degree in mathematics from the College of William and Mary in Williamsburg, VA and a masters in Education Entrepreneurship from the University of Pennsylvania. She resides in rural Adams County, Pennsylvania with her husband and two children.

*The Making Cents: Financial Literacy and Economic Education for Pennsylvania Teachers webinars are sponsored by the Pennsylvania Department of Education in cooperation with Penn State University*

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