



Educator Webinar

October 25, 2017

Topic	Speaker(s)
Webinar Overview and Instructions	Hilary Hunt
What College Students Wish They Knew About Personal Finance	Jason Pettner
Education Planner	Marla Kane
CPAs, CFPs, EAs, and more	Holly Chase
Wrap Up and Evaluation Instructions	Hilary Hunt

Mark Your Calendars for the Next Webinars: October 25th - afternoon and evening

Voices from the Classroom: How Four Teachers Approach Financial Education and the Resources they Use

Panel of Pennsylvania Teachers

Financial Reality Fairs: What They Are and How to Bring Them to Your School

Kathleen Fey, Pennsylvania Credit Union Foundation

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Making Cents: Financial Literacy and Economic Education for Pennsylvania Teachers Webinar – October 25, 2017

Important Links for Today's Webinar

Education Planner - www.educationplanner.org

My Smart Borrowing - www.mysmartborrowing.org

Financial Industry Regulatory Authority (FINRA)

- www.finra.org
- <https://brokercheck.finra.org/>
- <https://www.finra.org/investors/professional-designations>
- <https://www.finra.org/investors/accredited-designations>

Securities and Exchange Commission (SEC)

- www.sec.gov
- <https://www.adviserinfo.sec.gov/IAPD/Default.aspx>

Internal Revenue Service (IRS) –

- www.irs.gov
- <https://www.irs.gov/tax-professionals/overview-of-tax-return-preparer-requirements>

PA Department of Banking and Securities (DOBS) –

- www.dobs.pa.gov
- <http://www.dobs.pa.gov/Consumers/Pages/Investigate.aspx>

PA Insurance Department

- www.insurance.pa.gov
- <http://www.insurance.pa.gov/Consumers/FindInsProfessional/Pages/default.aspx>

PA Board of Accountancy

- <http://www.dos.pa.gov/ProfessionalLicensing/BoardsCommissions/Accountancy/Pages/default.aspx>
- <http://www.dos.pa.gov/ProfessionalLicensing/BoardsCommissions/Pages/Online-Licensing-Services.aspx>

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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

Hilary Hunt

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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.

Jason Pettner

Jason.Pettner@gmail.com

Jason Pettner is a Senior Finance major with a Certificate in Financial Planning at Penn State Behrend. Jason has spent the past three years interning in wealth and institutional asset management. On campus, Jason is heavily involved in clubs, specifically the Financial Planning Association and Intrieri Family Student Managed Fund, both of which he serves as President. Jason places a heavy emphasis on community outreach, especially in the area of improving financial literacy. In order to maximize financial literacy efforts, Jason sits on the Financial Literacy Committee for the CFA Society of Pittsburgh. Upon graduation, Jason plans to enter the investment industry.



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Marla Kane

mkane@pheaa.org

Marla Kane is a graduate of Shamokin Area High School and Bloomsburg University. She has been employed by PHEAA for over 10 years and assists students, parents, and families in understanding the costs and completing the forms required for post-secondary education and loan repayment. Additionally, Marla works with colleges, community, state agencies, and government officials to assist with career, education, and financial aid.



Prior to her work with PHEAA, Marla was an Adjunct Professor at Luzerne County Community College in Northumberland County. She also worked with the PA CareerLink System – Central Susquehanna Opportunities, Inc. assisting Out of School Youth and as a grant writer/public relations coordinator. In upstate New York, Marla served as program director at Addison Youth Center where she supervised staff, grants, and programming and in the marketing department at Corning Incorporated.

Holly Chase

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Holly Chase is a seasoned financial educator, writer, and presenter specializing in community-based financial education for adults. She has worked with national, state, and local non-profit organizations and government agencies in the areas of financial education program development, training, and outreach; trained over 1,600 educators, counselors, and social workers in financial content and delivery; and delivered over 200 financial education workshops to Pennsylvania consumers. Ms. Chase co-authored the EIFLE™ Award winning program, *Right On the Money*; developed the “Financial Education Boot Camp” educator training program; was nominated for the Secretary’s Award for Excellence by the Pennsylvania Department of Banking.



Ms. Chase is currently the financial education officer with the Pennsylvania Housing Finance Agency (PHFA) where she leads financial literacy initiatives, including housing counseling and education, housing services, and mortgage servicing divisions. Ms. Chase designed PHFA’s flagship pre-purchase financial education program, *Building Your Financial House*, and the online borrower-delinquency prevention course, *Securing Your Financial House*.

Ms. Chase began her financial career as an advisor with American Express Financial Advisors (now Ameriprise) and Merrill Lynch, followed by housing counseling and education with the Housing Alliance of York. Prior to joining PHFA, she spent several years with the Pennsylvania Office of Financial Education, supporting the financial education efforts of community-based organizations.

Ms. Chase holds a BS degree in Chemistry and attended The Graduate School at the University of Wisconsin and is a Certified Financial Planner™ certificant.

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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.Program Contact Information

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