

FINANCE UNIVERSITY

20th Annual Finance University
Morgantown Marriott
Two Waterfront Place, Morgantown, WV 26505
July 24-28, 2022

Sunday, July 24th

3:30p – 5:30p **Finance University Registration**
Morgantown Marriott Main Lobby

6:00p – 8:00p **20th Anniversary Celebration Dinner**
Morgantown Marriott – Salon FGH

DAY 1 – Monday, July 25th

6:00a – 8:00a **BREAKFAST** – *Provided*
Morgantown Marriott – Salon D

8:15a – 8:30a **Welcome**
Dr. Joshua Hall, Dean, John Chambers College of Business and Economics

8:30a – 10:15a **FoolProof: Teach Your Students How to be Healthy Consumer Skeptics**
Mike Sheffer, Director of Education, FoolProof Foundation

10:15a – 10:30a **BREAK**

10:30a – 11:00a **Influencing: A Lifestyle or a Life Goal?**
Kiran Boggs, West Virginia University student majoring in Finance

11:00a – 12:00p **Federal Reserve Bank Resources**
Sarah Gunn, Director of Economic Education, Federal Reserve Bank of Richmond

12:00p – 1:00p **LUNCH** – *Provided*
Morgantown Marriott – Salon D

1:00p – 2:00p **West Virginia State Treasury Financial Literacy Program Overview**
Katlyn Harmon, Financial Education Specialist, WV State Treasurer's Office

2:00p – 5:00p **Next Gen Personal Finance Tools and Resources**
Yanely Espinal, Director of Educational Outreach, NGPF

5:00pm **RECESS:** Evening and Dinner – On Your Own

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DAY 2 – Tuesday, July 26th

- 7:00a – 8:15a **BREAKFAST** – *Provided*
Morgantown Marriott – Salon D
- 8:15a– 10:00a **Tour of Reynolds Hall**
83 Beechurst Avenue, Morgantown
- 10:00a – 11:00a **How Bitcoin is Shaping the Future of Financial Systems**
Evan Gump, Associate, Pinnacle Elite
- 11:00a – 12:00p **Understanding Credit**
Angela Holdsworth, Vice President Premier Banker, BB&T now Truist
Lisa Zeller, Vice President & Mortgage Loan Officer, Truist Financial Corporation
- 12:00p – 12:45p **LUNCH** - *Provided*
Morgantown Marriott – Salon D
- 12:45p – 2:30p **Take Charge of Teaching Personal Finance with Take Charge Today**
Lisa Bender, M.Ed., NBCT, Director of TCT National Master Educator Team, Take Charge Today: University of Arizona
- 2:30p – 2:45p **BREAK**
- 2:45p – 3:30p **Budgeting**
Jennifer Ross, Adjunct Faculty, WVU Finance Department
- 3:30p – 5:30p **Escape Room Team Building Activity**
Morgantown Marriott – Salon D
- 5:30pm **RECESS:** Evening and Dinner – On Your Own

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DAY 3 – Wednesday, July 27th

- 7:30am – 8:30a **BREAKFAST** – *Provided*
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- 8:30a – 9:30a **Understanding Student Aid: From Policy to Payment**
Brian Bollinger, Student Financial Coordinator, The Hub, West Virginia University
- 9:30a – 10:30a **Stash 101**
Janessa Boulay, Director of Education, Stash 101
- 10:30a – 11:00a **BREAK**
- 11:00a – 12:00p **8 Topics to Know about Taxes**
Damon DeSue, Global Tax Controller, PRA Group
- 12:00p – 1:00p **LUNCH** – *Provided*
Morgantown Marriott – Salon D
- 1:00p – 2:15p **WV State Pension Snapshot/Overview of Financial Planning & Goal Setting**
Kyle Bero, CRES®, Financial Consultant, Ascent Financial Group
- 2:15p – 2:30p **BREAK**
- 2:30p – 4:30p **The Importance of a Financial Plan**
Eugene M. Natali, Jr., CFA, CEO & Co-founder, Troutwood
- 4:30p – 4:45p **Daily Summary & Wrap-Up; What is Jump\$tart?**
Amy Pridemore, Director of the Center for Financial Literacy & Education
- 4:45p **RECESS:** Evening and Dinner – On Your Own

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DAY 4 – Thursday, July 28th

- 7:30a – 9:00a **BREAKFAST** – *Provided*
Morgantown Marriott – Salon D
- 9:00a – 9:30a **WVDE:** Finance Certification and WVDE Requirements & Standards
Sarah Wamsley, Career Technical Education Services Coordinator, WVDE
- 9:30a – 10:00a **Linking Ethics to Economics: A new Center at WVU**
Cathleen Johnson & Brian Koglemann, WVU Chambers College Department of Economics
- 10:00a – 10:15a **BREAK**
- 10:15 – 12:00p **Foundations of Insurance Coverages**
Dr. David Brauer, Author & Public Speaker
- 12:00p – 12:45p **LUNCH** - *Provided*
- 12:45 – 1:30p **WVU Extension/CFLE Partnership**
Daisy Bailey, WVU Extension Service
- 1:30p – 2:15p **Collaboration Exercise**
Amy Pridemore, Director of the Center for Financial Literacy & Education
- 2:15p – 2:30p **Presentation of Certificates**
- 2:30p **ADJOURN – Conclude 2022 Finance University**

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