



**MFEC 2014 Statewide Financial Education Conference & Resource Fair**  
**"Financial Security for a Lifetime!"**

April 28 & 29, 2014 Red Lion Colonial Hotel Helena, Montana

**April 28, 2014**

- 5:00 p.m. Reception and Resource Fair - Capital Ballroom
- 6:15 p.m. Montana Lt. Governor, Angela McLean – Opening Remarks
- 6:30 p.m. Gene Natali – *The Missing Semester: Your Financial Choices Have Consequences. Will you Choose Wisely?*
- 7:30 p.m. Event Concludes

**April 29, 2014**

- 7:00 a.m. Registration and Continental Breakfast – Conference Lobby
- 8:00 a.m. **Welcome – Grand Ballroom**  
Diana Holshue, *MFEC President*
- 8:30 **Keynote Presentation** (Open to Public)  
*Jean Chatzky Making Money Make Sense*
- 9:30 Monica Lindeen, Montana Commissioner of Securities and Insurance – General Session Address and Q&A
- 10:00 Tim Fox, Montana Attorney General – General Session Address and Q&A
- 10:30 Break
- 10:45 **Panel Discussion Greatest Challenges to Achieving Financial Security for a Lifetime** Moderator *Marsha Goetting, MSU*; Panelists: *Jean Chatzky; Matt Dale, Office of Consumer Protection, Department of Justice; Lynne Egan, Deputy Securities Commissioner; Melanie Hall, Montana Banking Commissioner*

**REGULAR CONFERENCE BEGINS FOR PAID REGISTERED PARTICIPANTS**

- 11:45 **Lunch – Keynote Presentation**  
*Carroll College Professor Belle Marie Using Metaphors to Understand the Complex Phenomenon of Financial Literacy*
- 1:00-1:40 **Three Concurrent Sessions**
1. Gene Natali - *The Missing Semester*
  2. Montana Military Financial Alliance - *The Battle at Home: Financial Challenges Faced by Montana's Citizen Soldiers, AND A Call for Volunteers: MMFA's Financial Education Boot Camp*
  3. John Donovan, SBA & Chris Shove, MBAC, *Is your Business Idea Bankable?*
- 1:50-2:30 **Three Concurrent Sessions**
1. Belle Marie - *Original Research on Financial Education in Montana*
  2. Susan Sarver & Joel Schumacher - *Providing Community Based Financial Education with Impact: Know Your Audience*
  3. Monica Lindeen, CSI – *Facts about the Affordable Care Act*, Lynn Egan, Deputy CSI, Cindy Palmer
- 2:40-3:20 **Three Concurrent Sessions**
1. Mike Fee - *EverFi in Montana High Schools*
  2. Kimberly Shappee - *Personal Finance for Women*
  3. Al Ward, Montana Crime Prevention Association - *Protecting against Financial Fraud*
- 3:30 **Panel** (with past mini-grant recipients) – Capital Ballroom  
*Open discussion: MFEC's accomplishments and suggested ideas for future*
- Concluding Remarks** – Diana Holshue, MFEC President
- 5:00 **Adjourn**