



MFEC
Montana Financial
Education Coalition

MFEC Quarterly Board Meeting

AARP Office
30 West 14th Street, Suite 301
Helena, MT 59601

September 10, 2025

Annual Meeting and Luncheon

AARP's office is located on the third floor of the building. It is next to the Silver Star Steak Company and across the street from Hokkaido Ramen & Sushi Bar. The entrance is shared by Senator Daine's office as well.

Meeting Agenda

- Noon Lunch hosted by AARP
- Photo of Board of Directors to be posted to the website and our social media in addition to sending to National Jump\$tart
 - In front of the fountain by the Great Northern Hotel and Montana Carousel
- 1:00 p.m. Call to Order to Establish Quorum
- Introductions
 - Board of Directors List (Attachments)
- 1:10 p.m. Approval of Meeting Minutes **(Voting Item)**
- June 2025
- 1:15 p.m. Treasurer's Report (Attachments)
- 1:30 p.m. General Business
- New Board Member - **(Voting Item)**
 - Shana Wold; Accountant II, City of Bozeman
 - MFEC Calendars - Guin
 - Jump\$tart National Educator Conference (NEC)
 - Teachers that MFEC has recommended to Jump\$tart to attend
 - Dawn Smartnick – Jefferson High School
 - Amy Griffin – Westby School District #3
 - Travel scholarships
 - Requirement to submit a report to the MFEC for December meeting
 - Future Planning and Goals for 2026
 - Increase Sponsorships and Introduce Sustaining Partners **(Attachments)**
 - Increase sponsorships and sustaining partners by 10 – 15%
 - Increase exposure through digital channels and increase traffic to socials and website – Content Calander
 - Increase Teacher Engagement
 - Increase reach and teacher engagement by 15%

- Teen Teach In
 - Support this Jump\$tart initiative by helping to facilitate an increase of schools participating by 5%
- Teacher of the Year Award
 - Introduce at the March FinLit conference
- Increase engagement throughout Financial Literacy Month
 - Green Socks Day
 - Increased social media posts
 - Celebrate board member efforts throughout the month of April
- Fraud Prevention Summit – Jennell & Tim (**Attachments**)
- Strategic Planning – Joel

2:45 p.m. Break

3:00 pm. Conference Committee Update - Joel

3:10 p.m. K-12 Committee Update – Gayla & Dax

3:20 p.m. Outreach Committee Update – Guinevere

3:30 p.m. Member Go-Around

- Share a success and a goal for the 4th Quarter of the year

** Reminder that annual written committee updates for 2025 are due for the December meeting **

Adjourn by 4:00 p.m.

Next Meeting Date: December 9, 2025 (**Virtual Only**)