

Vision for the Future: Financial Empowerment Conference for Individuals with Disabilities

Why This Conference? Why Now?

Money plays a critical role in our daily lives. Unfortunately, many people have not had the opportunity to learn effective money management skills. As we seek to help individuals with disabilities achieve greater independence, we need to provide them with financial education so that they will have the tools they need to plan for their own financial futures.

Let's Come Together as a Community!

Change cannot happen in a vacuum. Change occurs only when many people across different sectors come together for a common purpose. That's why we need you to join with us!

When and Where:

Thursday, October 3, 2019

Forest Room, Keystone Building, Harrisburg, PA.

Agenda

8:30 – 9:00 a.m. Registration and Continental Breakfast

9:00 – 9:30 a.m. **Keynote**

Welcome: Derek Baker, Past President, PATF; and Susan Tachau, CEO, PATF.

Steve Suroviec, CEO, ACHIEVA (formerly RCPA, Deputy Secretary of the Office of Developmental Programs and Executive Director of the Arc of PA). Steve will speak about the importance of integrating financial education in school and community settings for successful employment and independent living. [Video](#) (former Governor Tom Ridge)

9:30 – 10:15 a.m. **Financial Education - 101**

There is a common misconception that financial education is just knowing 'how to budget.' This session will discuss what financial education is and what it isn't, review the key money concepts we all need to know, and provide updates on the current landscape of state and national government efforts in this arena.

(Presenters: Holly Zugay (PHFA) and Hilary Hunt (Making Cents Project))

10:15 – 10:30 a.m. Break

10:30 – 11:15 a.m. **Financial Education - 102**

This session will examine the unique challenges that individuals with disabilities have about money. Included will be information about the Social Security Work Incentives, benefits counseling, ways individuals with disabilities and their families *can* save (e.g. PA's ABLE program), and a general overview of other adult decision-making options.

(Presenters: Susan Tachau, PATF; Diana Fishlock, PA Treasury; Shari Mamas, Esq., Disability Rights Network of PA)

- 11:15 – 12:15 p.m. **Where Financial Education Fits – The Ultimate Inclusion in Specific Programming**
Relevance and timeliness are important factors affecting the successful delivery of financial education. The agencies and organizations serving individuals with disabilities have an advantage of reaching their clients and consumers at very teachable money moments in the course of delivering services. This session will discuss how financial education can fit into services including Workforce Innovation and Opportunity Act (WIOA) and Employment First initiatives as well as Home and Community-Based Services waiver programs (including Community HealthChoices).
(Presenters: Kristin Ahrens, Deputy Secretary, Office of Developmental Programs; Kevin Hancock, Deputy Secretary, Office of Long Term Living; Ryan Hyde, Office of Vocational Rehabilitation)
- 12:15 – 1:15 p.m. **Lunch**
Money Club Participants and Mentor (ACHIEVA), Treasurer Joe Torsella
- 1:15 – 1:30 p.m. **Break**
- 1:30 – 2:45 p.m. **Financial Education Tools**
This session will explore existing financial education resources that are available here in Pennsylvania, including PATF’s *Cents and Sensibility: a Guide to Money Management*, FDIC’s *Money Smart*, PHFA’s *Building Your Financial House*, CFPB’s *Your Money, Your Goals* as well as resources from the PA Departments of Banking & Securities and Education.
(Presenters: Susan Tachau, PATF; Lee Ann Antol, FDIC; Holly Chase, Pennsylvania Housing Finance Agency; Jill Wheeler, Consumer Financial Protection Bureau; Becky MacDicken, PA Department of Banking and Securities; and a representative from PA Department of Education)
- 2:45 p.m. – 3:15 p.m. **Visit Vendor Tables**
Resource materials will be available at the vendor tables. Staff from federal, state and other PA agencies will be available to answer questions and provide information.
- 3:15 p.m.– 4:00 p.m. **What Have We Learned and Where Do We Go from Here?**
Panelists will discuss their own experiences with financial education, share key takeaways from the information presented during the conference, and brainstorm ways to support, implement, or expand financial education efforts.
(Moderator: Richard Edley, RCPA. Speakers include PA Labor & Industry Secretary Jerry Oleksiak; Devon Grant, Governor’s Cabinet and Advisory Committee for People with Disabilities; Josie Badger, #IWantToWork, Consultant; Charles Horton, Inglis)
- 4:00 – 4:30 p.m. **Closing Session**
State Representative Bryan Cutler, Senator Jay Costa
- 4:30 p.m. **Adjourn**