



Annual Conference on Financial Education™

presented by the INSTITUTE FOR FINANCIAL LITERACY®

April 17-19, 2023

The Royal Sonesta San Juan

Carolina, Puerto Rico

DAY 1

8:00am - 9:00am

Check-In & Breakfast

9:00am - 9:15am

Opening Remarks

Rachel Gordon

Institute for Financial Literacy

9:15am - 10:15am

The Power of Negative Thinking: Building Financial Empathy by Embracing the Suck

Carissa Uhlman

10:15am - 10:30am

Coffee Break

10:30am - 11:30am

Breaking Down Financial Equity Barriers with Financial Edutainment

Bill Mills & Amanda Paolicelli

11:30am - 12:50pm

Networking Lunch

1:00pm - 2:00pm

Who Are You Missing with Your Financial Education Programs?

Karen Hassett & Susan Tachau

Focus Session:

Financial Literacy on the College Campus

Identifying and Navigating Unique Financial Aid Situations

Amber Taylor & Morgen Patrick

2:00pm - 2:15pm

Coffee Break

2:15pm - 3:15pm

Five Steps in Financial Planning Using Technology and Mobile Applications

José A. Medina & Arelis Rivera

Focus Session:

Financial Literacy in the Workplace

Aquaponics and Financial Education:

It's a Fishy Business

Robert Arnhold

3:15pm - 3:30pm

Snack Break

3:30pm - 4:30pm

5 Secrets to Unforgettable Financial Workshops

Emily Schwartz

6:00pm - 8:00pm

EIFLE Awards Dinner

DAY 2

8:00am - 9:00am

Check-In & Breakfast

9:00am - 9:15am

Morning Remarks

9:15am - 10:15am

Have You Ever? Retrain Your Brain for Smart Money Decisions

Theresa Popp Braun

10:15am - 10:30am

Coffee Break

10:30am - 11:30am

Behavioral Economics: What it is and How it Affects Our Money

Jen Jones

11:30am - 12:50pm

Networking Lunch

1:00pm - 2:00pm

The But What Can We Do About the Gender Wage Gap?

Carissa Uhlman

Focus Session:

Financial Literacy on the College Campus

Foundations of Financial Coaching

Jeanne Walsh & Amanda Kostman

2:00pm - 2:15pm

Coffee Break

2:15pm - 3:15pm

Fintech Revolutionizing Financial Services

Brenda Jimenez

Focus Session:

Financial Literacy in the Workplace

Financial Wellness Programs for the Workplace

Ramat Oyetunji

3:15pm - 4:00pm

Extended Exhibit Hours

3:45pm - 7:15pm

Walking Tour / Trip to Old San Juan

Dinner On Your Own

DAY 3

8:00am - 9:00am

Check-In & Breakfast

9:00am - 9:15am

Morning Remarks

9:15am - 10:15am

Let's Talk Money:

How to Get More out of Financial Coaching

Julie Heaton & Sarah DeWolfe

10:15am - 10:30am

Coffee Break

10:30am - 11:30am

Storytelling in Financial Education

Dana Miranda

11:30am - 11:45am

Closing Remarks

Rachel Gordon

Institute for Financial Literacy

Translation Services will be available for all sessions and events in Preciosa Ballroom.

Attendees will receive a Certificate of Attendance, and access to Fincert.org's self-study course Ethics for Educators in Personal Finance, via email following the event.

Attendees may earn up to 14 General & 2 Ethics CEUs through Fincert.org by participating in all sessions and completing the ethics course.

Preciosa Ballroom

Azucenas Ballroom

Querube Ballroom: Exhibits Open

Palmar C



Thank You
2023 Sponsors



EMPOWERING THE NEXT GENERATION OF LAWYERS®

