

Financial Education Summit: Ensuring the Financial Capability of the Next Generation

October 26, 2014, 10 am to 4:30 pm

NCAI Annual Session

Hyatt Regency Atlanta

DRAFT AGENDA as of October 10, 2014

Description:

Join tribal leaders, Native youth leaders, members of the President's Advisory Council on Financial Capability for Young Americans, Native organization leaders, and financial services and government representatives in an interactive summit to highlight and explore the unique role of tribal nations in strengthening financial capability of Native youth. Native youth are our most important resource and few topics are as important as ensuring that our youth have the education, skills and services to become capable and engaged citizens of our tribal nations. Tribal nations have a critical role in enhancing the financial capability of Native youth – and all tribal citizens – that is unique among governments. This full day pre-session will include a discussion among tribal leaders and Native youth leaders about the opportunities and challenges on topics such as transition to college and how to afford it, consumer protection, per capita payments, using technology to access financial services, and employment. In the afternoon, there will be a roundtable with members of the PACFCYA to share Native models and promising practices on financial education, asset building, youth employment, and consumer protection to inform the Council's recommendations to the President in their report next March.

Attendees:

- Members of President's Council on Financial Capability for Young Americans (PACFCYA)
- Members of Native Financial Education Coalition (NFEC) Advisory Committee
- Federal/Non Federal Resource Agency Representatives
- Tribal Leaders and Tribal Youth Leaders

Purpose:

- **Information Sharing** To learn from tribal government leaders and Native youth about strategies and promising practices that strengthen Native financial capability.
- **Inform PACFCYA** To capture success stories to inform the PACFCYA about how tribal governments are using their unique role to strengthen financial capability.
- **Peer Sharing** To learn about tribal governance strategies that promote the financial capability of tribal citizens and how peers have implement them.
- **Data Gathering** To capture topics and models for a future NFEC policy paper: *Tribal Governance Models for Promoting Native Financial Capability*

The National Congress of American Indians

71st Annual Convention is **October 26-31** in Atlanta, GA

Hyatt Regency Atlanta - Hanover E Room

DRAFT AGENDA

10:00 am	<ul style="list-style-type: none">- Welcome/Opening Prayer- Introductions- Review Meeting Purpose
10:30 am	<p>Tribal and Youth Leader Strategy Session</p> <p><i>Topics:</i></p> <ul style="list-style-type: none">- <i>What is the situation with Native young people and financial capability?</i>- <i>What are examples of good tribal governance to address this?</i><ul style="list-style-type: none">o <i>Raised dais with chairs on stage (3 youth, 3 tribal leaders)</i>o <i>Each panelist gives 3-5 minute introductory remarks</i>o <i>Q&A from moderator</i>o <i>Q&A from audience</i>
Noon	<p>Lunch in Regency VI room</p> <p><i>Introduction by Jim James</i> Vince Logan, Office of Special Trustee</p> <p><i>Introduction by Elke Chenevey</i> FINRA Investor Education Foundation – Gary Mottola, Speaker, NFCS Data Analysis</p>
1:30 pm	<p>Roundtable with representatives from President’s Council on Financial Capability for Young Americans</p> <ul style="list-style-type: none">- Opening Remarks from representatives from Council (5 minutes each)<ul style="list-style-type: none">o CFPB, Operation Hope, FINRA, NFTE, NCAI- Presentation of Model Programs<ul style="list-style-type: none">o Janet Owle, EBCI – per capita paymentso René Dubay, Salish Kootenai College – Young adult financial educationo Sunny Guillory, NWIC – youth financial educationo Nikki Pieratos, Northern Eagle Federal Credit Union – innovative financial products and serviceso Lakota Mowrer, Four Bands – asset building and financial educationo Natalie Charley, Taala Fund – youth savings
3:30 pm	Break
3:45 pm	<p>Recommendations to President’s Council: Incorporating the Unique Role of Tribal Governments in Promoting Financial Capability</p> <ul style="list-style-type: none">• Identify policy recommendations for tribal governments that mirror Cities for Financial Empowerment
4:30 pm	Adjourn