



# FINANCE UNIVERSITY

***ECONOMIC & FINANCIAL EDUCATION FOR TEACHERS***

Finance University 2009

## Sunday, August 2

Overnight Guests – Sunday room check-in from 5:00 p.m. to 7:00 p.m. Maclin Hall (Building 10)  
Park on WVa 61 all week

Commuters / Presenters - Park in the commuter lot between the Library and the Tech Center (Building 6)  
all week

## Monday, August 3

(Building 6 - Tech Center: Cafeteria on 2nd Floor, Classroom on 1st Floor)

8:30 - Breakfast

9:00 - Introductions with special guest Greg Ingram (Montgomery Recorder)

9:30 - Lynn Bennett – NetWorth program overview

10:00 - Dr. Bill Riley (Professor of Finance - WVU) – Case study discussion

10:30 - Break

10:45 - Dr. Riley – Case study continued / stock market simulation

11:30 - Lunch

12:30 - Lis Turner (Federal Reserve Bank of Richmond) – Budgeting workshop

2:45 - Break

3:00 - John Ranson (Raymond James Financial) – Stocks, Bonds, Mutual Funds, Retirement Planning (401k, IRA, etc)

4:45 - Journal

5:00 - Dinner

6:00 - Lab

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## Tuesday, August 4

8:30 - Breakfast

9:00 - Review / Focus  
Case continuation / Mutual fund analysis

10:00 - Larry Abshire (West Virginia Insurance Commission) - Health, Auto, Life

10:30 - Break

10:45 - Larry Abshire - Annuities

11:00 - Steve Fisher (WV Housing Development Fund) - Real Estate Decisions

12:00 - Lunch

1:00 - John Meeks (FDIC - Raleigh) - Banking and Financial Institutions

3:00 - Break

3:15 - Bill Cheeks (Jumpstart - Atlanta) - Credit Reports / GMAC

4:45 - Journal

5:00 - Dinner

6:00 - Lab

Jumpstart Meeting

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## Wednesday, August 5

8:30 - Breakfast

9:00 - Review / Focus  
Case continuation / Mutual Fund analysis

10:00 - Susie Irvine (AFSA Education Foundation) - MoneySKILL - Linking Students to Personal Finance

12:00 - Lunch

1:00 - Bryan Kelly (National White Collar Crime Center) – Computer Crimes

2:00 - Jerry Kelly (Bureau of Public Debt) - US Treasury Investments

## **Wednesday, August 5 (Continued)**

3:00 - David Garcia (The Hartford) - Smart 529

4:00 - Brian Wadsworth, CPA (Ellis & Ellis), Mark Pendelton, CPA (Arnett & Foster) - Tax Considerations in Personal Financial Planning

4:45 - Journal

5:00 - Dinner

6:00 - Lab

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## **Thursday, August 6**

8:30 - Breakfast

9:00 - Review / Focus  
Case continuation / Mutual Fund analysis

10:00 - Jill Miles (Deputy Attorney General) - Consumer Protection

11:00 - Mike Paris (Better Business Bureau) - Identity Theft

12:00 - Lunch

1:00 - Larry Pnakovich (WV Auditor's Office – Securities Commission) Investment Fraud

3:00 - Bill Heid (Stock Market Game World Wide) - SMG

4:00 - Jack Toney (Higher Education Policy Commission) – Financial Aid

4:45 - Journal

5:00 - Dinner

6:00 - Lab

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## **Friday, August 7**

8:30 - Breakfast

9:00 - Session Review

11:00 - Lunch / Certificate Presentation / Group Picture  
Special Guest: State Auditor Glen B. Gainer III