



PERSONAL FINANCE EDUCATION DAY

Tuesday, March 18, 2014

Sacred Hearts Academy & the Federal Reserve Bank of San Francisco

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#FinancialEdDay

AGENDA

- 9:00 AM **Welcome**
Megan Murphy, National Coalition of Girls' Schools
Betty White, Sacred Hearts Academy
Jody Hoff, Federal Reserve Bank of San Francisco
- 9:20 AM **Breakout Sessions, Round 1**
Purposes & Functions of the Fed
Personal Finance Workshop
How to Finance College
- 10:00 AM **Break**
- 10:20 AM **Breakout Sessions, Round 2**
- 11:00 AM **Break**
- 11:20 AM **Breakout Sessions, Round 3**
- 12:00 PM **Lunch**
- 1:00 PM **Entrepreneurial Leadership Panel Discussion**
Q&A immediately following
- 2:00 PM **Wrap up & adjourn**



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SPEAKER BIOS



SUSAN YAMADA

Executive Director

Pacific Asian Center for Entrepreneurship (PACE), University of Hawaii, Manoa

<http://shidler.hawaii.edu/pace>

Ms. Yamada has been the Executive Director of PACE since June 2008. Located within the University of Hawaii's Shidler College of Business, the Entrepreneurship Center hosts a comprehensive set of programs, utilizing both experiential and mentoring approaches to teaching students and faculty the process of entrepreneurship. Prior to assuming her position at PACE, Ms. Yamada spent 17 years working in senior management positions at various entrepreneurial start-up companies in California before returning home to Hawaii in 2001.

While in Silicon Valley, Ms. Yamada served as the founding CEO of TRUSTe, the first globally recognized, online privacy seal program dedicated to protecting users' personal information on the Internet. At TRUSTe, Ms. Yamada served as part of the founding management team for VEO Systems, a business-to-business software developer, which was subsequently sold to Commerce One in 1999.

Prior to founding TRUSTe, she led technology publisher *Upside Magazine* where she spent five years as the CEO and Publisher. *Upside* magazine was the first business magazine focusing exclusively on serving the information needs of technology executives.

Ms. Yamada is currently interested in the diversification of Hawaii's economy through the creation of high-growth, entrepreneurial companies. She was a founding member of the Hawaii Angels, a network of high net worth individuals who invest in start-up companies and an active mentor and investor in Hawaii-based, start-up companies.

Ms. Yamada serves as the Treasurer of the Board of Directors at the Hawaii Nature Center, Vice President of the Board of Directors of the Entrepreneurs' Foundation of Hawaii and board member of KCAA Preschools. She also heads the Yamada Scott Family Foundation, founded in 2000, whose mission is to inspire and support Hawaii's students in maximizing their potential via educational grants and scholarships.

Ms. Yamada grew up in Hawaii, graduated from James B. Castle High School, and earned a BBA degree from the University of Hawaii and an MBA degree from San Jose State University. She resides in Honolulu with her two children and enjoys golfing, traveling, reading, surfing, and spending time with family and friends.



LAUREN ELLIS

Founder, Aloha Bridal Connections
www.AlohaBridalConnections.com

Lauren Ellis is the Founder and Lead Wedding Coordinator at Aloha Bridal Connections (ABC). She started as an intern for several different companies to learn the tricks to the trade. Once gaining enough experience, she followed her entrepreneurial instincts and started ABC. In May of 2013, Lauren launched ABC with a passion for giving budget brides the opportunity to have their dream wedding.

Aloha Bridal Connections specializes in complimentary vendor referrals and affordable Day-of-Coordination that wraps up all the final details the couple has planned and brings their vision to life. Lauren holds a Bachelor of Business Administration in Entrepreneurship from the Shidler College of Business at the University of Hawaii at Manoa.



KIMO CARVALHO

Development and Community Relations Manager
The Institute for Human Services – www.ihshawaii.org

Chair, Board of Directors
Envision Hawaii – www.envisionhawaii.org

Kimo Carvalho is a local-born Hawaii Social Entrepreneur. As the Development and Community Relations Manager at IHS, The Institute for Human Services – Oahu's largest homeless agency working to end and prevent homelessness – Mr. Carvalho is responsible for helping the non-profit raise \$10M each year to operate its programs as well as working to adapt the non-profit in becoming more sustainable and innovative through creative business programs. Mr. Carvalho is also the Chairman of the Board at Envision Hawaii, the State of Hawaii's Social Entrepreneurship resource. This 10-year old non-profit has been responsible for building Hawaii's Social Entrepreneurship movement, and in facilitating business development in order to solve social issues impacting the State of Hawaii.

Mr. Carvalho is a graduate of Damien Memorial High School and has received his B.S. from Tulane University as well as his M.B.A. in Sustainable Development from Hawaii Pacific University. He is active in

Hawaii's corporate marketing and communications industry where he has led some of the State's largest and most impactful communication campaigns, including the Hawaii Clean Energy Initiative and NOAA's Papahānaumokuākea Marine National Monument's World Heritage site status. Mr. Carvalho is rooted in his community and culture. He assists local farmers and agriculture businesses both at his home in Waimanalo, as well as back home on the Big Island of Hawaii in Kailua-Kona. And he has previously served on various governance boards of Malama Maunalua, Hawaii Orchid Society, and NOAA's Reserve Advisory Council, and the Kohala Watershed Partnership.

Social Entrepreneurship was first introduced to Mr. Carvalho during college where he worked as a Paramedic during Hurricane Katrina in New Orleans, Louisiana. After working through "the storm" for 4-months straight, he decided to turn down medical school and rather tapped into a rare talent to communicate hard-scientific/tech-based facts into layperson terms useful for corporate marketing executives in Hawaii. He used this skill to develop his first social enterprise selling 20,000 t-shirts to help re-build a school cafeteria in New Orleans. And from there, 8-years ago (in 2006), Mr. Carvalho returned to his Hawaii home where he is now leading the Social Entrepreneurship movement and is part of a new generation of young professionals mobilizing into executive-level jobs in Hawaii.



MEGAN MURPHY
Executive Director
National Coalition of Girls' Schools
www.ncgs.org

Ms. Murphy is currently the Executive Director of the National Coalition of Girls' Schools (NCGS). NCGS is the leading advocate for girls' education with a distinct commitment to the transformative power of all-girls schools. The Coalition acts at the forefront of educational thought, collaborating and connecting globally with individuals, schools, and organizations dedicated to empowering girls to be influential contributors to the world.

Previous to joining NCGS, Megan served as the Vice President of Development and Alumni Affairs at Semester at Sea, a non-profit global education program in partnership with the University of Virginia. While there, Megan was instrumental in establishing a comprehensive development program and implementing a strategic outreach plan to 55,000 alumni world-wide. Previously she served as the Director of Development at all-girls Marlborough School where she directed the Leadership in Learning Campaign and led a talented team to raise more than \$71 million in annual, capital, and endowment gifts. She has also served as the Dean of Admissions and Enrollment Management at Allegheny College where she developed and implemented successful strategies to improve college-wide retention and was a consultant with George Dehne and Associates, an admissions marketing and enrollment strategy firm.

Megan earned her B.A. in International Studies and French from Allegheny College and an M.A. in Public Administration and International Affairs from the University of Pittsburgh. Megan has been a member of

the Allegheny College Alumni Council for several years and served as the President of the Council this past year. In addition, she served on the Board of the Henry T. Nicholas Education Foundation, Inc. and has participated in the National Association of Independent Schools Aspiring Heads Program and the NCGS Strategic Leadership Institute. Recently, Megan joined the advisory board of the Center for the Advancement of Girls at Agnes Irwin School.



JODY HOFF

Senior District Manager, Economic Education

Federal Reserve Bank of San Francisco

www.frbsf.org/education

Jody Hoff is the Senior District Manager of Economic Education in the Community Engagement Group at the Federal Reserve Bank of San Francisco (FRBSF). In this role, Jody has the responsibility of developing and executing educational strategies and programs for the nine states within the 12th District, and leads a team with staff in Los Angeles, Portland, San Francisco, and Seattle.

Under Jody's leadership, the Economic Education team has delivered training and programming to teachers and students throughout the District with a special focus on the use of simulations and web-based content and development of data visualization and video for the classroom. In addition, Jody is involved in a number of research projects examining the effectiveness of instructional strategies and tools.

Prior to her work at FRBSF, Jody served as the President for the Idaho Council on Economic Education and held secondary teaching certificates in economics, mathematics, and social studies. Jody has served on the executive committee for the National Association of Economic Educators and as the chair of Federal Reserve System Economic Education Group.

She has published classroom materials for EconEd Link, the National Council on Economic Education, the Public Broadcasting Service, and has earned teaching honors from the National Teacher Training Institute and the National Association of Economic Educators. Jody has presented programs and trained teachers throughout the U.S. and in China, Greece, Latvia, Russia, and South Korea.



LORRAINE THAYER

Assistant Manager & District Outreach, Economic Education

Federal Reserve Bank of San Francisco

www.frbsf.org/education

Lorraine Thayer is the District Assistant Manager of Economic Education at the Federal Reserve Bank of San Francisco. In this role, Lorraine manages the District's outreach efforts, forming strategic partnerships with state and local educational institutions, associations, and non-profit organizations. Lorraine serves as the 12th District representative to the Federal Reserve System Economic Education Group, and has served on the Executive Board of the Oregon Council on Economic Education, and as an advisor to Sabin Community Development's Board of Directors. In addition, she served on the steering and planning committee for the Oregon Museum of Science & Industry's national MoneyVille project, a traveling exhibit that provided financial literacy education for K – 12 students. Before joining the Federal Reserve Bank of San Francisco, Lorraine was in the hospitality industry, where she managed the sales and marketing efforts of a luxury hotel company in Portland, Oregon. Lorraine holds a Bachelor of Science in Business & Leadership from Marylhurst University.



REMA OXANDABOURE

Outreach & Social Media Specialist, Economic Education

Federal Reserve Bank of San Francisco

www.frbsf.org/education

Rema Oxandaboure is the Outreach & Social Media Specialist in Economic Education, and is based in the Los Angeles Branch of the Federal Reserve Bank of San Francisco. In this role, she develops and manages partnerships with organizations such as K-16 state and local educational entities, foundations, schools, and non-profit organizations. In addition, she coordinates efforts in social media, e-marketing, and educational technology. Rema also serves on the Federal Reserve System's Economic Education Marketing Committee. Prior to joining the Bank in 2008, Rema worked as a program coordinator for the Center for Active Learning in International Studies at the University of Southern California (USC). She holds a Bachelor's in International Relations from USC, and a Master of Science in Comparative and International Education from Drexel University.



Federal Reserve Bank of San Francisco

Economic Education Group

FREE EDUCATIONAL RESOURCES



American Currency Exhibit

This premier collection of historical currency is a truly priceless collection that brings history alive and shows you how currency actually shaped our country's history. Discover the role the Federal Reserve played, and continues to play, in this rich history. Available online or by visiting the San Francisco Fed.



DataPost

An online series that provides visual explanations of key economic concepts such as GDP, inflation, and unemployment. Includes "Core Presentations" for more in-depth tutorials, or presentations arranged by subject matter: Macroeconomics, Microeconomics, and International.



Economics in Person

An online video series highlighting San Francisco Fed economists giving brief talks about their research, economics, and the U.S. economy.



Fed Chairman Game

So, you want to be in charge of monetary policy at our country's central bank? See how it works by taking charge of a simulated economy in this interactive, online game.



What is the Fed?

An online resource that explains the history, structure, roles, and responsibilities of the U.S. central bank in plain English.

www.frbsf.org/education

www.federalreserveeducation.org