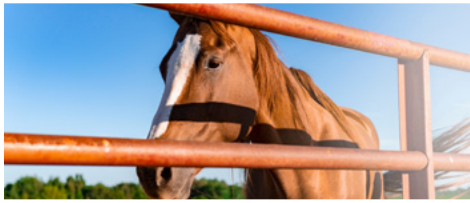
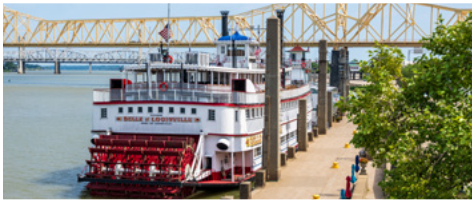


Teaching for Tomorrow, Today



2024 JumpStart National Educator Conference

November 2-4, 2024 • Omni Hotel Louisville • Louisville, Kentucky

2024 JumpStart National Educator Conference

Teaching for Tomorrow, Today.

The **JumpStart National Educator Conference** is the premier national conference dedicated exclusively to financial education in PreK-12 classrooms across the country and the talented professionals who teach it. Now in our 15th year, we can't wait to greet you at the beautiful Omni Louisville in Louisville, KY, November 2-4, 2024.

The **#JumpstartNEC** was launched in 2009 with seed money from our Founding Conference Underwriter, **Experian** and many other generous sponsors. This year, our top supporters – **Charles Schwab**, **National Endowment for Financial Education**, **Next Gen Personal Finance**, and the **Wells Fargo Foundation** – as well as many others, make it possible for all teacher participants to attend on scholarships, which cover your registration, hotel stay, and conference meals. (Keep reading to learn more.)

As always, the #JumpstartNEC will strive to introduce teachers to practical information, ideas, and resources that teachers can “start using Monday morning.” For return attendees and veteran teachers especially, there will be plenty of focus on what's new in finance and financial education. Networking is a key element of our mission, and our goal is for every new attendee to meet colleagues you never knew you had! And, importantly, we hope you will have fun, which is part of our way of thanking you for all that you do.

Guests

All guests will be required to register in advance to attend the event. There will be no onsite registration for participants or guests.

This Year's Event

In 2024, #JumpstartNEC will focus on bringing a new awareness in the classroom – how the speed of the digital age is impacting not only ourselves, but also your students – and we're bringing in experts to help you find the answers. For teachers of younger students, you'll have your own grade-appropriate discussions, framed within the changing world that kids will inherit.

Return attendees will notice that we are increasing our concurrent breakout sessions while keeping the interactive grade-level discussion groups to give teachers another opportunity to hear from and connect with each other. We are also separating our exhibition hall times by state to give you more time with exhibitors in a less hectic environment. We continue to try new things – often based on the feedback we receive from you – to keep our program dynamic and fresh.

Teacher Scholarships and Registration

For teachers, the JumpStart National Educator Conference is an all-scholarship event. Every teacher attends on a scholarship from JumpStart – supported by our generous underwriters and sponsors, listed on page 11 – or on an independent scholarship from one of our official scholarship partners. **Important Next Steps:**

1. First round scholarship recipients are notified by **September 6**. Your notification will include a link to register for the conference online. (Scholarships are non-transferrable.) Before you register:
 - Read through this **brochure**.
 - Carefully consider your **travel plans** and any travel restrictions that might pertain to you.
2. Teacher recipients accept their scholarships by registering for the conference online. The firm deadline to register is September 20.
 - Make a fully-refundable \$100 **deposit** when you register. (See page 3 for additional details.)
 - Purchase a **guest badge** for your spouse or adult guest when you register. (Optional)
 - Reserve **extra hotel nights** when you register. (Optional)
3. Scholarships unclaimed by September 20 will revert to the scholarship pool, enabling JumpStart to offer them to wait-listed applicants.
4. Second round scholarship recipients will be notified **September 20 – 26** on a rolling basis. Your notification will include a link to register for the conference online and a registration deadline. Scholarships are non-transferrable. See additional information, above.

Guest Registration

Registered attendees have the option of purchasing a Guest Badge for their spouse or other adult guest for **\$150**, which will enable the guest to attend all six meal functions. This event is not recommended for children and we're sorry, but we are not able to offer a meal-by-meal option. **Important:** No guest badges will be sold onsite this year, so you must register your guest in advance.

Use **#JumpstartNEC** hashtag before, during, and after the conference to stay informed, connect with fellow participants, and share your experience with others.

Important Next Steps

Teachers: See Page 2
Exhibitors: See Page 3
Sponsors and Special Guests: See Page 3

Declining Your Scholarship

If you do not plan to attend the NEC this year, please contact us immediately so that we might offer your scholarship to a wait-listed applicant.

Teacher Scholarships: What's Included and What's Not

JumpStart National Educator Conference teacher scholarships include:

- Conference **registration** and **materials**.
- Private **hotel room** at the Omni Louisville for the nights of November 2 and 3.
- Six **conference meals** from dinner on Saturday, November 2 through Lunch on Monday, November 4; as well as breaks on Sunday and Monday.
- A certificate for **15 professional development hours**, provided you attend the full conference.

Teachers (or their schools/districts) are responsible for their own:

- **Transportation costs** and arrangements – including ground transportation – to and from the conference.
- **Parking** fees at the hotel. Participants should consider using public transportation, shuttle services, and rideshare apps (such as Uber or Lyft).
- **Guest** registrations and any guest expenses.
- **Extra** nights in the hotel. If you reserve your optional extra nights in the hotel when you register for the conference, you will get them at our special conference rate.
- **Incidental expenses**.

If you received a scholarship from one of our independent scholarship provider programs, please check with your provider about what your scholarship covers. Some programs may include or arrange your travel.

Credit or Debit Card Deposit

All participants will be asked for a **\$100** deposit at the time of registration. This deposit is fully refundable provided you attend the full conference. Your deposit will be credited to the same credit or debit card that you provided, shortly after conclusion of the conference.

Travel Considerations

JumpStart does not control and cannot predict changes to travel-related rules and regulations. We encourage each conference attendee to make sure you understand your travel carrier's policies.

For teachers, your travel schedule must allow you to attend the full conference, as stipulated in your scholarship, so please plan travel accordingly. Optional pre-conference events begin at 3:00 p.m. on November 2. Door prizes will be drawn at the end of the conference (noon on November 4); you must be present to win. PDH certificates will be distributed at the conclusion of the conference, Monday, November 4th.

Exhibitor Registration

The #JumpstartNEC was designed not only to support classroom teachers, but just as importantly, to offer a platform to JumpStart Partners and other providers of financial education resources to share those resources and their expertise. As an exhibitor, you'll get the chance to network with your teacher audience, as well as fellow exhibitors, and leaders of the financial literacy community.

The exhibit fee of **\$1,500** covers your exhibit space and a full conference registration, with meal events, for one representative. As always, the exhibit fee is discounted for JumpStart National Partners and Sustaining Partners. Additional exhibitor representatives may be added for **\$250** each. **Important:** There will be no onsite exhibitor registration this year. If you need to add or change an exhibitor representative, please contact JumpStart prior to the start of the conference.

Once you have registered as an exhibitor, we will invoice you for your Exhibitor fees, which are due no later than **October 28, 2024**. Use the link and/or phone number found in the registration confirmation page to make your **hotel reservations** at the Omni Louisville at our special group rate.

Speakers, Sponsors, Board Members, and Invited Guests

Conference speakers, sponsors, JumpStart Board Members and other invited guests will receive a link from the JumpStart team where you can confirm your participation in the 2024 JumpStart National Educator Conference. Note that if you are already registered as a Teacher or Exhibitor, you do not need to RSVP again.

JumpStart Board Members who are not attending the #JumpstartNEC, but are planning to attend the onsite Board Meeting, must notify JumpStart in advance of any changes to representation at the Board Meeting.

Conference speakers, sponsors, JumpStart Board Members and other invited guests will also receive a link and phone number to make hotel reservations at our special group rate.

Conference Schedule begins on Page 4.
General information begins on Page 10.

Saturday, November 2

Conference Registration · 1:00 – 6:00 p.m.

Look for the JumpStart National Educator Conference registration desk at the top of the escalators on Level Two of the Omni Louisville Hotel.

Optional Pre-Conference Sessions

- **WISE Financial Literacy Certification Program Testing · 2:30 – 4:00 p.m.**

JumpStart National Partner, Working in Support of Education (WISE) will offer certification testing for its Financial Literacy Certification Program credential, in conjunction with our conference. Interested participants must register and pay for this exam separately. Please contact WISE directly at (212) 421-2700

- **Orientation for First-Time Conference Attendees · 3:00 – 4:00 p.m.**

If you're joining us for the first time—or haven't attended in a while—this special pre-conference orientation will help you make the most of your participation in #JumpstartNEC, as well as introduce you to some of what JumpStart has to offer. Meet fellow first-timers, teacher ambassadors, and members of the JumpStart team – and let us show you some appreciation, JumpStart style.

- **For Returning NEC Educators: Unlocking Financial Inclusion: Credit information in the present and the future, and how AI could influence our financial lives · 3:00 – 4:00 p.m. (repeats at 4:00 p.m. for First Time Attendees)**

Join Experian's Senior Director, and Secretary of JumpStart's National Board of Directors, [Rod Griffin](#), for an insider's look at credit reporting today, how the information used in credit and other financial decisions is expanding, and why doing so will be important to financial inclusion in the future. Learn more about how AI is being used today and how it may impact everyone in the future – for better or worse.

- **For First-Time Conference Attendees: Unlocking Financial Inclusion: Credit information in the present and the future, and how AI could influence our financial lives · 4:00 – 5:00 p.m.**

For those teachers who attended the Orientation at 3:00 p.m., [Rod Griffin](#) will repeat this session just for you. (description above).

Welcome to Louisville Home Run Reception and Dinner · 6:00 – 10:00 p.m.

JumpStart leadership and conference sponsors will be on hand to welcome you to Kentucky with a cocktail reception in the Olmstead Ballroom followed by dinner in the hotel's elegant Commonwealth Ballroom. For our baseball theme evening, wear your favorite baseball jersey or baseball hat and let's plan to knock it out of the park with a lot of fun! This very special event is a #JumpstartNEC tradition and our opportunity to say thank you for all you do. After dinner, we'll be treated to a performance by [Tom Pesce](#), a high-energy mentalist who will help us to look into the future in a different way! And he's also a teacher from Connecticut!

Baseball Themed attire.



Sunday, November 3

Conference Registration · 7:00 – 8:00 a.m.

Level Two – Omni Louisville Hotel

Breakfast · 7:00 – 8:00 a.m.

Start the day with our informal, open-seating breakfast buffet in the Commonwealth Rooms 1,2,3.

Opening Session · 8:15 – 9:30 a.m.

JumpStart Chairman [Casey Cortese](#) and President/CEO [Laura Levine](#) will kick off the 2024 JumpStart National Educator Conference program and set the stage for a full day of activities.

Where is Digital Addiction Taking Us?

[Dr. Nicholas Kardaras](#) is an Ivy League educated psychologist, best-selling author, internationally renowned speaker and an expert on mental health, addiction, and the impacts of our digital age. Dr. Kardaras will share his thoughts on the unintentional consequences of our new technology-driven world.

Opening Session – Part 2: Impressions, Contemplation, and Introspection · 9:45 – 10:30 a.m.

Teachers will be divided into grade-level groups (elementary school, middle school, high school) to discuss what they learned in the opening session and share ideas to bring back to their classroom next week.

Breakout Sessions · 10:45 – 11:30 a.m.

Pick from eight concurrent breakout sessions, described on page 7. At the conference, watch for messages from “Flip,” our conference chat bot.

Luncheon · 11:45 a.m. – 1:00 p.m.

Relax, network, and enjoy a midday meal before we welcome back to JumpStart NEC [Adam Carroll](#) will present a thought-provoking presentation, “When Money Isn’t Real”. Adam has spent the past decade studying human behavior, particularly as it relates to personal leadership and personal finance.

Breakout Sessions · 1:15 – 2:00 p.m.

Pick from eight concurrent breakout sessions, described on page 7.

Exhibit Hall · 2:15 – 5:00 p.m.

Dedicated Exhibit Hall hours give you time to peruse the exhibits and network with fellow participants – without having to “sneak out” of other sessions. Our exhibits are dedicated to financial education (no time-share promoters here!) and if you gather a few too many samples, the UPS Store will have a table inside to offer you options for sending resources home.

New this year! Exhibit Hall – Hattitude – JumpStart Teen Teach-In

We are separating the Exhibit Hall time this year by state representation!

- Teachers from Alabama - Minnesota will go to the Exhibit Hall from **2:15 – 3:15 p.m.** while teachers from Mississippi - Wyoming will attend a brief session that includes information about the [JumpStart Teen Teach-In](#) and [Hattitude](#) - an opportunity to create your own Kentucky Derby headpiece for the evening activities at Churchill Downs in case you didn't bring your own!
- Teachers from Mississippi - Wyoming will enter the Exhibit Hall from **3:15 – 4:15 p.m.** while the teachers from Alabama - Minnesota will attend a brief session that includes information about the [JumpStart Teen Teach-In](#) and [Hattitude](#) - an opportunity to create your own Kentucky Derby headpiece for the evening activities at Churchill Downs in case you didn't bring your own! *(order of states subject to change)*
- The Exhibit Hall will remain open for everyone until 5:00 p.m. with the always exciting Exhibitor Raffle.

Load Busses to the Kentucky Derby Museum · 5:30 – 5:50 p.m.

Kentucky Derby Museum · 6:00 – 10:00 p.m.

The Kentucky Derby Museum is one of the region's premier attractions, celebrating the tradition, history, hospitality, and pride of the world-renowned event that is the Kentucky Derby. In addition to food and beverages throughout the evening, JSNEC24 conference attendees and their guests will enjoy two floors of interactive exhibits, a 30-minute guided historic walking tour at Churchill Downs Racetrack and get their heart racing and emotions soaring watching the Museum's signature 18-minute movie, “The Greatest Race” on a 360°, 4K high-resolution screen.

Exhibitor Raffle:

- Many exhibitors will raffle great prizes.
- Enter at each booth.
- Drawings will take place before 5:00 p.m.

Please note that you must register for the guided tour of Churchill Downs in your conference registration. Only two groups of 65 can be taken to the track at one time, so attendees will be given time assignments that evening if they have indicated their desire to take the tour in their conference registration.

Monday, November 4

If you're leaving the hotel right after the conference, consider checking out of your hotel room before breakfast and leaving your suitcase at the Bell desk for a quick getaway after lunch. Please note that no luggage will be allowed in the ballroom.

Breakfast · 7:00 – 8:00 a.m.

Start the day with our informal, open-seating breakfast buffet in the Commonwealth Rooms 1,2,3. *At the conference, watch for messages from "Flip," our conference chat bot.*

Opening Remarks and Scholarship Awards · 8:00 – 8:45 a.m.

Laura Levine will be joined by JumpStart Chair [Casey Cortese](#) to welcome you to our final day and to announce the 2024 Chairman Scholarship Award Winners.

Breakout Sessions · 8:45 – 9:30 a.m.

Pick from eight concurrent breakout sessions, described on page 7.

General Session · 9:45 – 10:45 a.m.

What Does this Look Like Tomorrow?

[Dr. Renée Baker](#) is an award-winning entrepreneur, professor, TEDx speaker, and business & civic leader who is passionate about economic empowerment. Her story begins in a small town in Southern New Jersey, where she noticed a significant gap in financial literacy. This gap sparked her passion for her decades-long career in financial services and economic empowerment, guiding her to champion innovative strategies to diminish wealth disparities, uplift communities, and transform our global economic landscape.

Closing General Session · 10:45 – 11:45 a.m.

How Many Wins Have You Had Today?

[Jeff Eben](#) sustained a catastrophic injury at 16 that left him paralyzed and tasked with building his life and career in a wheelchair. After graduating high school and earning his degree and teaching credential from Fresno State University, Jeff Eben enjoyed a 30-year career in public education that included coaching football and basketball, teaching, and administration. Jeff spent the last years of his educator's career in Racine, Wisconsin where he was widely credited with the total cultural shift of a long time under-performing large urban high school.

Closing Session · 11:45 a.m. – Noon

Do you like prizes? Of course you do! Then don't miss the closing session of #JumpstartNEC where members of the JumpStart management team will be on hand to wrap up the conference, make some exciting announcements, and kick off our annual door prizes of really great stuff. You must be present to win!

Then, on your way out, pick up your [professional development certificate](#) and a [box lunch](#). Travel home safely!



Breakout Sessions

Sunday 10:45 a.m.

Financially Literate. Financially WISE (High School)

Join the team from [Working In Support of Education \(WISE\)](#), a national JumpStart partner, for an interactive discussion about personal finance and budgeting. Learn about the WISE Financial Literacy Certification Program, the innovative tools for evaluating and improving baseline personal finance knowledge, and how your students can become certified financially literate.

My First Nest Egg (Elementary School)

[My First Nest Egg](#), a new national JumpStart partner, gives you the tools to give your elementary school students the keys to financial success in just two minutes per day.

FDIC's Guide to Organizing a Reality Fair (Middle and High School)

A Reality Fair is a simulation of an adult's financial life that provides youth with an interactive experience for making real world financial decisions and managing money. Learn about the tools that [FDIC](#), a long-time JumpStart national partner and JSNEC24 sponsor, provides to help you plan a reality fair at your school.

FinLit for Gen Z: Engaging Younger Audiences (All Grades)

Gen Z faces distinct challenges when it comes to engaging with financial literacy—including relatability and value disconnect. This presentation will go over specific methods to help teachers connect personal finance topics to Gen Z students; these methods will include gamification and other strategies used in the [Banza](#) platform, social impact, practical skills, and more. Banza is a long-time national JumpStart partner.

Hands-On Kinesthetic Activities for General Education and Special Education Classrooms (Middle and High School)

This presentation from the [Math Foundation](#), a new JumpStart national partner, shares how middle and high school teachers can support and enrich student learning across disciplines using a movement-based, kinesthetic approach to instruction. Participants will learn trauma-informed, multi-sensory learning strategies that engage learners, build self-confidence, increase self-efficacy, and reduce learning deficits.

Harnessing AI to Transform Personal Finance Teaching (High School)

Unlock the future of personal finance education at our groundbreaking session on AI! Discover how to work smarter, not harder, with cutting-edge AI tools that enhance your lesson plans, productivity, and elevate student learning. Join James Redelsheimer from the [Foundation for Economic Education](#), a national JumpStart partner, to learn practical, innovative strategies that will transform your teaching and be at the forefront of educational technology!

NGPF Resources (Middle and High School)

Join [Tim Ranzetta](#), founder of [Next Gen Personal Finance](#) and JSNEC24 Underwriter, as you energize your classroom with "Let's PLAY: Making Finance Fun with NGPF," where you'll explore dynamic, interactive activities that get students moving and thinking critically about money management. Learn how to turn financial literacy into an adventure with games and scenarios that are both educational and fun.

Tax Truths: Elevate Your Financial IQ (Middle and High School)

A recent national survey found that most Americans do not understand the tax code. The importance of tax literacy in personal finance goes beyond the classroom—we can all stand to learn more about the taxes that impact our daily lives, and education is the first step in preparing your students to be informed future taxpayers, business owners, and even lawmakers. [TaxEDU](#), from the [Tax Foundation](#), a national JumpStart partner, will help you to learn more about common taxes and resources available for you and your students to make talking taxes less daunting.



Breakout Sessions continued

Sunday 1:15 p.m.

A Financial Plan for Life! (High School)

Gene Natali, founder of Troutwood, a national JumpStart partner, will provide actionable tools and resources to make personal finance a lifelong class. Discover strategies to engage and prepare students for real-world financial decision-making.

After High School: Addressing the Financial Aid Gap (High School)

As student debt becomes increasingly burdensome, we must work together to increase awareness of financial aid options that support life after high school. Intuit for Education, a JumpStart national partner and JSNEC24 sponsor, aims to increase the number of students who complete and submit their FAFSA. This session will bring educators and key experts together to develop a new standard of financial aid literacy that will enable students about how to support their life after high school.

Get Your Students on the Pathway to Financial Success (All Grades)

Come learn about Pathway to Financial Success in Schools – a comprehensive, award-winning financial literacy resource for grades 3-12. This ever-expanding, free program from two national JumpStart partners, Discover and Discovery Education features numerous interactive modules, videos, classroom activities, family connections, and more. Find out how you can put them to use in your classroom!

Hands On Banking Experience (Middle and High School)

The Hands on Banking® Experience from Wells Fargo a JSNEC24 Underwriter and national JumpStart board member, is a “real-world” money management simulation, designed for high school students and young adults, that helps teach important financial education concepts such as budgeting, comparison shopping, and evaluating needs, wants, and tradeoffs in a relevant and engaging way.

Hands-On Kinesthetic Activities to Enhance Financial Literacy (Elementary School)

This presentation from the Math Foundation, a new JumpStart national partner, shares elementary school teachers can support and enrich student learning across disciplines using a movement-based, kinesthetic approach to instruction. Participants will learn trauma-informed, multi-sensory learning strategies that engage learners, build self-confidence, increase self-efficacy, and reduce learning deficits.

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Personal Finance from the Start: Elementary Lessons for Young Learners (Elementary School)

Bring the fun to personal finance lessons in your elementary classroom with captivating video shorts and engaging activities that teach the money essentials. Join this interactive session with Jennifer Seitz, Director of Education at Greenlight, a JumpStart national partner, for highlights from Greenlight for Classrooms – a free library of personal finance lessons with 100+ videos covering grades K-12 and mapped to national and state standards.

They Just Add Up: Math Knowledge + Financial Knowledge = Better Outcomes (High Schools)

This research from a JumpStart national board member, FINRA Foundation, examines the joint roles of math and financial knowledge (and math and financial education) on people’s financial outcomes. We find that those who demonstrate high levels of both financial knowledge and math knowledge have better financial outcomes than their counterparts with high levels of only math or financial knowledge.



Breakout Sessions continued

Monday 8:45 a.m.

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Financial Game Show and Resources from the Fed (All Grades)

This hands-on and engaging session will highlight a wide array of resources from the Federal Reserve System that will take you beyond the textbook. The interactive program will feature a game show style trivia that you can utilize in your classroom. Join us for fun, prizes, and free resources!

Get Your Students on the Pathway to Financial Success (All Grades)

Come learn about Pathway to Financial Success in Schools – a comprehensive, award-winning financial literacy resource for grades 3-12. This ever-expanding, free program from two JumpStart national partners, Discover and Discovery Education features numerous interactive modules, videos, classroom activities, family connections, and more. Find out how you can put them to use in your classroom!

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General Information

Meet Flip!

Just before #JumpstartNEC, participants will receive a text message introducing them to Flip, our conference chatbot. Want to know where the bathrooms are? Ask Flip. What time is breakfast? Ask Flip. You can even ask him to tell you a joke! Along with our conference app, Flip will keep you informed throughout the event.



Conference App

Look for an announcement in the coming weeks that the JSNEC24 conference app is available in the Apple App Store or Google Play Store. Before you arrive, download our conference app onto your smart phone or other mobile device to keep the conference schedule, presenter bios, and other important information close at hand.

Omni Louisville Hotel

At the Omni Louisville Hotel, experiences are tailored to the history and rhythm of the city. Enjoy built-in entertainment and uninterrupted connectivity in one of 612 charming guest accommodations. Our downtown Louisville hotel is steps from the Kentucky International Convention Center and plenty of things to do in the city. Main Street, Fourth Street Live, Whiskey Row Distilleries and Louisville Slugger Museum & Factory are all less than a mile away from our hotel in Louisville, KY. [Check out the hotel's website for policies and FAQs.](#)

Traveling to Louisville

- [Louisville International Airport \(SDF\)](#) is located 5.9 miles (approximately 10 minutes) from the hotel.
- [Cincinnati International Airport \(CVG\)](#) is located 95.8 miles (approximately 1 hour and 30 minutes) from the hotel.
- The [Omni Louisville Hotel's](#) physical address is 400 S 2nd Street, Louisville, Kentucky 40202.
 - Overnight valet parking at the Omni Louisville Hotel is \$42 per night, per car.

Dress for Success

Throughout the conference, **school casual** attire is recommended, with a couple of exceptions:

- **Baseball casual attire** is expected for Saturday night's Welcome to Louisville Home Run Reception and Dinner in the Olmstead and Commonwealth Ballrooms.
- **Kentucky Derby attire** is appropriate for the Kentucky Derby Museum on Sunday night. Ladies: if you choose not to bring your own Derby hat, you can make a Derby fascinator at the Hattitude Session Sunday afternoon. Also keep in mind the Churchill Downs tour is a walking tour.

Weather in Louisville

The average temperature in November typically ranges from around 62°F (16°C) to 51°F (14°C). Keep in mind that this range can vary from year to year, so it's always a good idea to check more recent and accurate sources for up-to-date weather information. You might want to check a weather service such as www.weather.com before you pack.



The **JumpStart Coalition for Personal Financial Literacy** is a nonprofit organization founded in 1995 to advance financial literacy, especially among our nation's preschool through college-age students, through communication, collaboration, and a commitment to effectiveness in financial education. JumpStart is a promoter of more than 100 national partner organizations and a network of independent state affiliates that work collectively and cooperatively toward shared goals. JumpStart is the original promoter of April as Financial Literacy Month and its #CheckYourSchool campaign is working to get effective financial education into all of our nation's schools.

Platinum Benefactor Sponsor



Charles Schwab

At Charles Schwab, we believe in the power of investing to help individuals create a better tomorrow. We have a history of challenging the status quo in our industry, innovating in ways that benefit investors and the advisors and employers who serve them, and championing our clients' goals with passion and integrity. We provide financial services to millions of people in two ways:

- Investor Services is a modern, full-service brokerage platform for those who invest on their own or through a workplace-sponsored retirement equity plan.
- Advisor Services offers trading, custody, technology, practice management, and other support services to nearly 15,000 independent investment advisors. Schwab was built around a simple idea: put the client first. We work hard to make our clients' goals the focus of everything we do by offering a better, more modern way for them to build and manage their wealth.

Conference Underwriters



Wells Fargo Foundation

Wells Fargo & Company (NYSE: WFC) is a leading financial services company that has approximately \$1.9 trillion in assets. We provide a diversified set of banking, investment and mortgage products and services, as well as consumer and commercial finance. Wells Fargo ranked No. 34 on Fortune's 2024 rankings of America's largest corporations. In the communities we serve, the company focuses its social impact on building a sustainable, inclusive future for all by supporting housing affordability, small business growth, financial health, and a low-carbon economy. In 2023, Wells Fargo donated approximately \$300 million to over 3,000 nonprofits in support of housing, small business, financial health, sustainability and other community needs.



National Endowment for Financial Education

The Denver-based nonprofit College for Financial Planning was established in 1972 as the nation's first educational institution providing financial planning coursework to professionals. At that time, the College created the standard-setting CERTIFIED FINANCIAL PLANNER™ certification, which helped define the concept of financial planning and establish it as a profession. Over the next two decades, the College expanded, diversified and advanced its interaction with the public. In 1984, the first financial education program launched, and in 1992, NEFE was formed as the parent entity of the College. In 1997, the Board of Trustees recognized the importance of focusing the foundation's efforts on financial education—particularly those segments of the population whose needs were not being met by others. NEFE transferred ownership, sold its assets—including all of the College's professional education programs—and established NEFE as an independent, nonprofit foundation solely dedicated to personal finance education. The proceeds financed our endowment, which funds our work today.

Next Gen Personal Finance



After witnessing the profound impact of a personal finance course on students and their parents at Eastside College Prep over several years, we launched Next Gen Personal Finance in 2014 with a simple yet powerful premise: every student in U.S. high schools should cross their graduation stage equipped with the financial skills they need to thrive in the future. Our mission is ambitious—by 2030, every U.S. high school student will graduate having taken a one-semester course in personal finance. We started with just one school, Eastside College Prep in East Palo Alto, and from the beginning, we committed to making all NGPF services free, ensuring that cost would never be a barrier to learning. Today, more than 100,000 educators rely on the NGPF platform for their curriculum and professional development needs, all provided at no cost to educators. Thanks to our collective efforts, 26 states have now passed laws requiring a semester-long course in personal finance, covering 64% of high school students either currently or in the near future.

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