



FINANCIAL LITERACY FORUM

CELEBRATING FINANCIAL LITERACY MONTH 2021

April 27, 2021 // 9:00AM - 12PM EST

PRESENTING SPONSOR: JPMORGAN CHASE & CO.

mymoneyworkshop.org/events/financial-literacy-forum/



My Money Workshop 2021 Financial Literacy Forum Agenda and Speaker Bios

My Money Workshop’s 2021 Financial Literacy Forum celebrates the partnerships My Money Workshop has made and the impact that together with our donors, volunteers, clients, and partners have affected on the communities we serve. Thank you so much to all of our excellent speakers and JPMorgan Chase, our Presenting Sponsor! We look forward to a fantastic event.

<u>Format</u>	<u>Time</u>	<u>Topic</u>
Welcome	9:00 – 9:10 am	Welcome Gineyda Diaz
Keynote: Presenting Sponsor	9:10 – 9:40 am	Our Path Forward JPMORGAN CHASE & CO.
Guest Speaker	9:45 – 10:10 am	Lessons from The Poverty Symposium Jessica Reinmann, (914)Cares
Partner Panel	10:10 – 10:30 am	Women’s Economic Empowerment Panel Nyasha Rivera, Women’s Prison Association Maria Palma, The Kota Alliance Laura Rotter, Owner, True Abundance Advisors Ramona Thomas, Financial Advisor, Ameriprise Financial Helene Reda, Chief Operations and Administrative Officer, Eleven Canterbury Moderator, Celene Menschel Vice President of Operations, Max My Interest, MMW Board Secretary
Guest Speaker	10:35 – 10:55 am	COVID-19 in the South Bronx: What We’ve Learned and How We Move Forward Kara Smith, South Bronx Rising Together
Break	10:55 – 11:00 am	JPMorgan Chase – The Path Forward Ad
Guest Speaker	11:00 – 11:30 am	Student Loans and Student Consumer Protections NYS Department of Financial Services Winston Berkman-Breen
Guest Speaker	11:30 – 11:50 am	Youth Financial Wellness Program at Comp Sci High John Campos and Albert Paez, Comp Sci High
Closing	11:50 – 12:50 pm	Closing

Speakers:

Presenting Sponsor

JPMORGAN CHASE & CO.



Nichol King serves the Harlem community as the Community Manager for Chase Bank's first-of-its-kind community style branch. Known affectionately as "Harlem's Banker," Nichol has been a fixture in the Harlem community for decades as an influencer, mentor and financial literacy advocate.

Her role at the Harlem branch is pioneering programs to support financial health, hosting education and enrichment workshops focused on unique community needs, and supporting growth for entrepreneurs who are starting or expanding their businesses in the neighborhood. Her success in Harlem has led the firm to use the new branch as a model for similar community-focused branches that will open in more than a dozen cities across the country in the coming years.

While she is trailblazing the role as Chase's first Community Manager, she has held a variety of roles in banking. She began her banking career at the same prominent location at 55 W 125th Street. From Licensed Personal Banker, to New Build Branch Manager, to Small Business Relationship Manager, Nichol's exposure to varying retail banking roles has uniquely positioned her to effectively deliver to the ever changing needs of the evolving Harlem community.

Beyond the branch, Nichol regularly leads and contributes to financial literacy seminars such as Women Trailblazing in Business, the Women In the Black Conference, and Economic Development Day for Harlem Week, among many others.

Nichol reached the pinnacle of her community contributions when Congressional Representative Charles Rangel recognized her for her efforts with a proclamation naming January 15, 2016 as "Nichol King Day".

King's kinship with Harlem – the neighborhood's rich history and vibrant outlook toward the future – began when the neighborhood served as the home to her first paid job at age 15. She made a promise to herself she would move back to the iconic community which she did in 1999 before becoming a homeowner in the hamlet in 2007.

A graduate of SUNY Empire State College, Nichol spends her time away from work enjoying time with her family, traveling and cooking.



Department of Financial Services – Student loans and Student Protections

Winston Berkman-Breen is the Director of Consumer Advocacy at the Department of Financial Services. In this role, he proposes and advances consumer protection policies and advises on consumer matters across the business units, including regulatory action, enforcement investigations, and community engagement. He is also the Department's Student Loan Advocate and works with its Student Protection Unit staff to respond to student loan borrower needs and to address emerging education finance issues, including processing borrower complaints and investigating lending and servicing practices. Prior to joining DFS, Winston worked in legal services, with a focus on affirmative and defensive litigation related to debt collection, student loans, and foreclosure. He was a Justice Catalyst Fellow and Staff Attorney

with the Consumer Protection Unit at the New York Legal Assistance Group, and was a Fellow with the Project on Predatory Student Lending at the Legal Services Center of Harvard Law School.



South Bronx Rising Together – Covid Insecurity Panel

Kara Smith, Collective Impact Manager, Policy & Communications South Bronx Rising Together

Kara Smith is a dedicated advocate for justice and is passionate about elevating community voice through storytelling by ways of policy and data. Prior to joining the South Bronx Rising Together, she worked for a collective impact initiative in Michigan focusing on birth equity outcomes for Black and Latinx women and children. Kara completed her BSW and BA in sociology at Calvin University and earned her MSSA from Case Western Reserve University with a concentration in policy and research.

South Bronx Rising Together:

South Bronx Rising Together (SBRT) is a community-wide collective impact initiative with a network of neighborhood residents and program providers who aim to build pathways to success for children and youth from cradle through college and career. SBRT envisions a South Bronx that is a vibrant community of infinite opportunity where people aspire to live, work, and raise families.



914 Cares – Poverty Summit

Jessica Reinmann is the founder, chairman and CEO of 914 Cares, Inc a not for profit organization located in Westchester County NY. The organization focuses on ensuring that neighbors living in need are cared for. Jessica is known as expert on Poverty in Westchester county and frequently speaks on panels regarding the issue.

Prior to founding 914 Cares Jessica worked briefly as a real estate attorney in NYC and in the administrative side of law firm management. For over 12 years, she worked in a number of development and management advisory capacities at two top 100 law firms.

Jessica graduated from Binghamton University in 1997 with a degree in political science and a JD from Cardozo Law School in 2000. Jessica lives in Chappaqua, NY with her husband Adam, their two children, Molly and Zack, their dogs, Murray and Toby, and their two cats, Sami and Cooper.

Women’s Economic Panel – Empowering Women’s Economic Success



Ramona Thomas is a Financial Advisor at Ameriprise Financial Services who provides comprehensive financial planning services to clients and recommends suitable investment products and services based on their financial goals, resources, time horizon, risk profile and preferences. She has extensive experience in nonprofit management, philanthropy (traditional grant making and venture investing), and in education, specifically in developing and executing initiatives from the ground up. She holds a bachelor’s degree in Applied Mathematics from Brown University and a doctorate in Higher Education from the University of Pennsylvania. She loves traveling to new destinations and enjoys hiking in rain forests abroad.



Laura Rotter, CFA, CFP is the owner of True Abundance Advisors, a heart-centered, values-based financial planning firm based in New York. After a successful career managing money for institutional investors including Citicorp and Para Advisors, Laura discovered mindfulness practices and was drawn to guide professionals facing a big life change to achieve both financial security and life satisfaction. Since making her shift, she has been featured in CNBC, the Wall Street Journal, and Westchester Senior Voice, is on the advisory council of Impact100 Westchester, a women’s group giving organization, and volunteers with My Money Workshop, teaching financial literacy to underserved communities.



Nyasha Rivera –Deputy Managing Director of Reentry Services, Women’s Prison Association (WPA). Nyasha Rivera is a transformational leader and change agent with a passion for activating, cultivating, and mobilizing the leader within others. As a licensed Social Worker and public health professional, Nyasha believes solutions to the most prominent issues in our society lie at the intersection of social work and public health. Nyasha is an experienced advocate, educator, and community organizer with years of experience in direct service, program development and program management. She currently serves as Deputy Managing Director of Reentry Services at the Women’s Prison Association (WPA), where she has worked since 2015. In this role, Nyasha provides executive level oversight of WPA’s Transitional Services and Workforce

Development & Employment Services departments, which seek to connect women impacted by the criminal legal system to trauma-responsive services, peer mentorship, educational opportunities, and meaningful careers."

WPA is the nation's first organization for women impacted by incarceration. Their approach is personal. We address the root causes of systems involvement, know the data, and are focused on the needs and nuances of individuals.

They believe women are the experts in their own lives. We partner with women to use our collective voice and experience to drive change that positively impacts families, communities, and society.

They envision a society where our reliance on incarceration has been replaced by constructive, community-driven responses.



Maria Palma – Board Member, The Kota Alliance

Maria Eugenia Palma is an investment and planning professional working with global high net worth families. She works closely with her clients to deliver sustainable impact investment solutions that align with their long term goals and family values. She has been involved with a wide variety of women focused non-profit organizations in both US and Latin America. She is a strong supporter of Venezuela social impact programs. She is an MBA graduate from the Wharton School.

The Kota Alliance improves and empowers women’s lives through impactful collaboration. By sharing ideas and working together, we seek to pave the way for future progress for women’s rights.



Helene Reda’s career in financial industries spans over thirty-five years. Currently, she is the Chief Operations and Administrative Officer for Eleven Canterbury, a unique boutique firm which is a cross between a consulting firm and an expert network offering the best of both worlds. Earlier roles included Assistant Vice President within ABN Amro’s MIS Reporting group and Assistant Treasurer at JPMorgan Chase. Helene holds a DM and MSM in Homeland Security from Colorado Technical University, a BA in Political Science from Niagara University, and has completed MBA course work in Finance / MIS from Pace University’s Lubin School of Business. In addition, Helene is licensed in life, health and accident insurance in 14 states and certified for NYS Partnership for Long Term Care.



Panel Moderator – Celene Menschel

Celene Menschel joined the Board of Directs for My Money Workshop in September 2018 and serves as the Board Secretary. Celene is Vice President of Operations at Max My interest, an intelligent cash management solution that helps users maximize yield and FDIC insurance coverage. Celene is also on the board of Trustees at Nightingale-Bamford and the Board of Advisors at Hospital for Special Surgery. Celene graduated cum laude from Harvard College and has an MBA from Harvard Business School.



Comp Sci

John Campos, Comp Sci High Founding Director of Partnerships

Albert Paez, Comp Sci High, Partnership Manager

Comp Sci High’s vision is to use the power of education, technology, and community to become an engine of opportunity and a force for economic freedom in the South Bronx.

Their mission is to ensure every student graduates with college acceptance letters, high tech skills, real work experience, and a plan to turn those opportunities into a successful career. They are a diverse group of educators empowering Bronx students with the academic and tech skills they need to access college, jobs, social empowerment, and limitless opportunity that lie just a mile from their doorstep.

