

www.calcpa.org/summit

register today!

THE SUMMIT WILL ACHIEVE OUR SHARED GOALS OF:

- Making communities more powerful, effective and efficient.
- Promoting model programs and partnerships.
- Connecting people, organizations and communities to further personal finance education through sharing of resources.

WHO SHOULD ATTEND?

- Nonprofit organizations involved in personal finance education
- Community-based organizations
- CPAs
- Educators
- School boards
- PTA members
- Students (high school/college)
- Media
- Legislators
- Government agencies
- Businesses and financial service organizations
- Foundations



1235 Radio Road
Redwood City, CA 94065-1217

**WEDNESDAY,
APRIL 23, 2008**
SACRAMENTO
CONVENTION CENTER

9 a.m. Registration
10 a.m.–5 p.m. Summit
Reception immediately following.

There is no charge to participate in the Summit, thanks to our generous sponsors.

HURRY,
space is limited!

There is no charge to participate in the Summit, thanks to our generous sponsors:



WEDNESDAY, APRIL 23, 2008
SACRAMENTO CONVENTION CENTER



reserve your seat today!



Hosted by:
California Society of Certified Public Accountants & California JumpStart Coalition

The California Summit on Financial Literacy gathers together California's and the nation's thought leaders in personal finance education to create a shared vision of a financially literate California.

Join us for the 2008 Summit and be part of the solution as we empower and connect change agents from students to legislators to make the fight against financial illiteracy more powerful, effective and efficient.



CA
CALIFORNIA
\$UMMIT
FINANCIAL
LITERACY

CALIFORNIA SUMMIT *on* FINANCIAL LITERACY

WEDNESDAY, APRIL 23, 2008 SACRAMENTO CONVENTION CENTER

Tomorrow Starts Today

Imagine a California in which everyone—children, families and adults, young and old—has a secure financial future. It's within our reach. Together, let's empower Californians to make smart financial decisions.



Join us at the California Summit on Financial Literacy and learn how you can contribute to the solution.

Fax completed form to (650) 802-6214, register online at www.calcpa.org/summit or call (800) 922-5272.

Concurrent Sessions

CHOOSE ONE FROM THIS COLUMN:

- Climbing Out of California's Housing Sinkhole
- Personal Finance Education in the Classroom: 9–12
- Adult Empowerment Roundtables

CHOOSE ONE FROM THIS COLUMN:

- Making an Impact on Your College Campus
- Community Empowerment Programs

Member ID No. _____ CPA License No. _____

Nonmember

Name _____

E-mail _____

Firm/Company _____ Title/Position _____

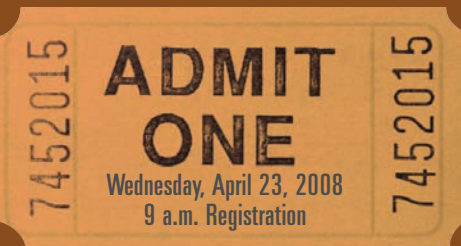
Phone _____ Fax _____

Address _____

City, State, ZIP _____

{ SIGNUP NOW }

10 a.m.—5 p.m. Summit • Reception follows



Welcome and Introductions

TERESA MASON, CPA
CHAIR, CALIFORNIA SOCIETY OF CPAs

JIM GREENWOOD, CHAIR
CALIFORNIA JUMP\$TART COALITION

Creating Success Together

Alone, no individual or group will be able to improve Californians' financial literacy. However, through the power of coalition building, partnerships and community involvement, success is possible.

DON BLANDIN, PRESIDENT & CEO
INVESTOR PROTECTION TRUST
WASHINGTON, D.C.

Empowering California's Students

Even without a curriculum mandate it is possible to provide personal finance education to every student in California.

JACK O'CONNELL
CALIFORNIA STATE SUPERINTENDENT
OF PUBLIC INSTRUCTION
SACRAMENTO

Spreading the Word

Public service announcements extend the reach of grass-roots efforts.

Keynote Address

JEAN CHATZKY
PERSONAL FINANCE EXPERT
THE TODAY SHOW AND
THE OPRAH WINFREY SHOW

Lunch Break/Exhibits

- California Jump\$Tart Coalition Awards
- Leadership in Financial Literacy Award

Climbing Out of California's Housing Sinkhole

Increasing foreclosures, bankruptcies and credit debt have tarnished the Golden State. What do you and your constituents need to know to climb out of this sinkhole with your personal finances—and dignity—in tact.

Facilitators: PAM KRUEGER AND JACK GALLAGHER
PBS MONEYTRACK

SPECIAL DOUBLE SESSION: Personal Finance Education in the Classroom: 9–12

Educators, administrators, program providers and volunteers connect via speed-dating style session that offers exposure to several top personal finance education programs.

Together, Let's Empower Californians

Adult Empowerment Roundtables

One size does not fit all when it comes to educating adults on personal finances. Roundtable discussions offer an opportunity for volunteers, program providers and community representatives to share targeted resources and best practices.

Community Empowerment Programs

Asset building, economic education and financial counseling are among the valuable services nonprofits deliver throughout the state to low-income Californians. Learn how these model programs are making a difference one Californian at a time.

Facilitator: JACK GALLAGHER

Making an Impact on Your College Campus

California's colleges and universities are a breeding ground for financial illiteracy. That needs to change. Be a part of the solution as we convene students, educators and volunteers to design a model of financial literacy for our best and brightest.

Facilitator: PAM KRUEGER

Enrichment Works

Theater to Inspire Learning

Closing Keynotes

PAM KRUEGER AND JACK GALLAGHER;
PBS MONEYTRACK

Networking Cocktail Reception



register today!



California Society Certified Public Accountants



CalCPA Institute



CALIFORNIA CPA EDUCATION FOUNDATION

faxthisback

did you know?

- The personal savings rate in the United States is 0%.
- In 2007, credit card delinquencies nationwide jumped 26% from 2006.
- In 2007, personal bankruptcies continued to rise.
- Total non-mortgage consumer debt is more than \$2.5 trillion and on the rise.
- Almost 5 million Californians live below the poverty line.
- In 2007, foreclosures increased 75% nationwide.

