



*Presented by
The Center for Financial Independence and Innovation &
The Georgia Consortium for Personal Financial Literacy*

8:30 a.m. – 5:00 p.m. April 3, 2008

Hosted by the Federal Reserve Bank of Atlanta

The purpose of The Summit was to create an environment where service providers, community leaders, and financial literacy experts could learn from one another and develop a greater understanding of the ways in which all Georgians can enjoy a more secure, satisfying and independent life. The ultimate goal of this event was to support Georgia's leaders in the financial and disability sectors in making informed and educated decisions about their own finances and to strengthen their ability to help those around them become better educated consumers.



Radio Talk Show Host Clark Howard addresses Summit Attendees



The Honorable Judge Joyce Bihary and the Honorable C. Ray Mullins discuss Bankruptcy issues.

The radio talk show host Clark Howard discussed consumer fraud alerts and identity theft prevention. Three plenary speakers were featured at the 2008 Summit. The Honorable Judge Joyce Bihary and the Honorable Judge C. Ray Mullins from the U.S. Bankruptcy Court presented on the policies, process, and implications of bankruptcy for all Georgians including issues specific to those individuals with disabilities.



Michael Morris, National



Participants ask questions of panelists

Disability Institute

Michael Morris from the National Disability Institute issued a call to action for leaders in the disability service and financial sectors to work together to ensure all Georgians have access to quality financial education and services.

Breakout Sessions

Two breakout sessions were held, with presentations from experts in the field of financial services. The morning breakout session on credit included presentations on: *Building Credit Correctly* (Patricia Jimenez-Ronka, Consumer Credit Counseling) *Understanding Your Credit Score* (John Ulzheimer, Credit.com); *Reading Your Credit Report* (Bill Cheeks, Retired Equifax). Afternoon Breakout session presentations focused on banking and included: *Creating a Livable Budget* (Sally Atwell & Curtis Rodgers, The Shepherd Center, & Janet Jordan, Georgia Dept. of Community Affairs); *Understanding Financial Services* (Tom Stokes, FDIC); and *Banking the Unbanked* (Lynette Bell, SunTrust Bank & Chiquita Board, Get Checking). Attendees were given a chance in these sessions to learn about specific topics related to credit and banking from financial experts in smaller group settings.



Ask the Advisor Luncheon

The luncheon session was designed to facilitate one-on-one interactions between attendees and financial experts, including plenary and breakout session presenters, as well as other professionals from the financial and disability service sectors. Experts were available to answer questions.



Ask the Advisor Lunch



Meeting Coordinators with Clark Howard

There were over 110 attendees of the Summit: Steps to Building Financial Literacy and Independence. Plans are in the works for another Summit in the spring of 2009. Thanks to our all of our Sponsors and especially the Federal Reserve Bank of Atlanta and the Georgia Society of CPAs for all of their support.