

PHFA and the PA Dept of Banking Office of Financial Education
present

Financial Ed Boot Camp

Thursday, March 18, 2010

9:30 AM – 3:30 PM

Cranberry Township, PA

Payday lenders... Speedy tax return advances... Predatory lending... These are just some of the traps enticing people that are short on funds into bad situations. But even if they avoid these traps, their entire world is shaped by their financial options and know-how.

Housing professionals have opportunities to interact with and influence residents regarding their financial circumstances. When rent is late or goes unpaid... If a resident uses money orders... When utilities are shut-off... These and other cues indicate that there may be an opportunity to help residents improve their financial position.

Financial Ed Boot Camp is an intense program **created for service coordinators, site managers, social workers and other housing staff** to help them recognize these opportunities and design effective financial education programs for their residents – formal and informal.

Objectives - As a result of the workshop, participants will be able to:

- Define what financial literacy is and the benefits of financial education.
- Understand the impact of limited financial literacy on resident behaviors and choices.
- Identify personal finance topics relevant to the needs of residents.
- Identify key elements of effective financial education, available resources and potential partners to assist them in designing financial education programs for residents.

Presenter - Holly Chase is the community-based financial education specialist with the Pennsylvania Office of Financial Education. In this capacity, she helps community-based organizations offer high-quality financial education and counseling throughout the Commonwealth. Ms. Chase is responsible for coordinating the annual Common Wealth Symposium and contributing to www.moneysbestfriend.com. She helped design the Right On the Money financial education program and conducted the first pilot of the curriculum.

Prior to joining the Office of Financial Education, Ms. Chase spent several years in housing counseling and education with the Housing Alliance of York. She was also a financial advisor with American Express Financial Advisors (now Ameriprise) and Merrill Lynch. Ms. Chase holds a BS degree in chemistry and attended The Graduate School at the University of Wisconsin, participated in the accounting focused study program at York College of Pennsylvania and is working toward certification by the Certified Financial Planner Board of Standards, having passed the board exam in 2007.

Location –Cranberry Township Municipal Building, 2525 Rochester Road,
Cranberry Township, PA 16066

[Click here for directions to Cranberry Township Municipal Building](#)

Free parking is available on-site

Fee - \$25 includes lunch.

For more information, contact Steve Chopek at 412.429.2843 or schopek@phfa.org

Registration Form for Financial Ed Boot Camp
March 18, 2010 at Cranberry Township Municipal Building

Attendee Information:

Name

Organization

Job Title

Address

City

State

Zip Code

Daytime Phone

Email Address

Special Needs:

Dietary Requirements:

Meals Provided: Lunch

Registration Fee: \$25. Please make check payable to: Pennsylvania Housing Finance Agency and **mail this form along with your payment by March 11, 2010 to:**

Pennsylvania Housing Finance Agency
c/o Crystal Baker
211 North Front Street
Harrisburg, PA 17101