



Society of Financial and Career Consulting Professionals

Coming Together. Empowering Others.

Friday, June 1

- 9:00 AM—11:00 AM **Optional Bonus Session with Florida Prosperity Partnership**
Exploring Alternative Financial Services in Our Community
Representative Robert “Bobby O” Olszewski, FL District 44
Sherod Halliburton, Manatee Community Federal Credit Union
- 11:00 AM—12:00 PM **Speed Networking** *Bring your business cards! It’s a race to meet your peers!*
- 12:00 PM—1:30 PM **Lunch Your Way** *Explore the hotel and the surrounding area to find a restaurant you prefer.*
- 1:30 PM—2:00 PM **Enhancing Identity Theft Awareness**
Protecting personal information and your company. Resolving challenging issues with identity theft.
Theresa Adlam, Office of the Attorney General
- 2:00 PM—4:00 PM **Breakout Sessions** *Select one to attend.*
- Session 1: Zen and the Art of the Financial Plan**
Take the fear out of finance. Demystifying income statements and balance sheets, explaining gross profit and net income, defining financial language and analyzing how numbers affect the bottom line.
Julia Aquino-Serrano
- Session 2: Zen and the Art of Success**
Creating success for small not for profit agencies and independents, credit restoration ethics, marketing for small agencies and entrepreneurs while measuring and defining success.
Ronda Brunson, Teresa Martin, Bernadine Turpin, Frances Williams
- Session 3: Student Loan Counseling – Real World Applications**
Navigating the frequently-shifting world of student loans and making massive debts manageable. Includes updates in legislation, available programs and rising issues.
Phil Heinemann, Bonnie Canty



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Friday, June 1 (*continued*)

4:00 PM—5:30 PM **Society of Financial and Career Consulting Professionals
Annual Board Meeting**

- Get involved
- Become a board member
- All ideas welcome
- Member-driven

After the meeting, join us for the Annual Unofficial Happy Hour by the Pool.

Saturday, June 2

9:00 AM—9:15 AM **Opening Remarks**
Sharon Giovinazzo, World Services for the Blind

9:15 AM—10:00 AM **How to Implement a Financial Coaching Program**
Hiba Haroon, Prosperity Now

10:00 AM—10:30 AM **BankOn**
Bill Mills, Florida Prosperity Partnership

10:30 AM—10:45 AM **Break**
Long enough for a trip to the bathroom, but not long enough for a bath.

10:45 AM—12:00 PM **Student Loan Panel**

12:00 PM—1:00 PM **Lunch**
Provided



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Saturday, June 2 (*continued*)

- 1:00 PM—1:30 PM **ABLE Accounts to Grow Savings for the Disabled**
Chris Rodriguez
- 1:30 PM—2:30 PM **One Page Business Plan Entrepreneur/Small Agencies Panel**
Julia Aquino-Serrano, Teresa Martin, Frances Williams
- 2:30 PM—3:00 PM **Whose Life is it Anyway? Communication and Improvisation for Success**
Glen Krasny
- 3:00 PM—3:15 PM **Break**
Stretch your legs and take a walk, just stay away from Room 237!
- 3:15 PM—4:00 PM **Credit Reports and Scoring: Empowering your Client to Meet their Goals**
Bill Lavender
- 4:00 PM—4:30PM **Financial Implications and Solutions for Problem Gamblers**
Brian Kongsvik, Florida Council on Compulsive Gambling
- 4:30 PM—5:00 PM **Four Pillars of Stress Management**
Jeannie Martingano, JeannieFit Wellness Champion
- 5:00 PM—5:30 PM **Advocating for the Industry and Consumers: Pay Day and Signature Loans**
Tina Pollard
- 5:30 PM—6:00 PM **Motivational Interviewing: Financial and Career Coaching and Closing Remarks**
Heather Aiello