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
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*
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Speaker(s)</th>
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<tbody>
<tr>
<td>1:00 PM—1:30 PM</td>
<td><strong>ABLE Accounts to Grow Savings for the Disabled</strong></td>
<td>Chris Rodriguez</td>
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<tr>
<td>1:30 PM—2:30 PM</td>
<td><strong>One Page Business Plan Entrepreneur/Small Agencies Panel</strong></td>
<td>Julia Aquino-Serrano, Teresa Martin, Frances Williams</td>
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<tr>
<td>2:30 PM—3:00 PM</td>
<td><strong>Whose Life is it Anyway? Communication and Improvisation for Success</strong></td>
<td>Glen Krasny</td>
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<td>3:00 PM—3:15 PM</td>
<td><strong>Break</strong></td>
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<td>3:15 PM—4:00 PM</td>
<td><strong>Credit Reports and Scoring: Empowering your Client to Meet their Goals</strong></td>
<td>Bill Lavender</td>
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<td>4:00 PM—4:30 PM</td>
<td><strong>Financial Implications and Solutions for Problem Gamblers</strong></td>
<td>Brian Kongsvik, Florida Council on Compulsive Gambling</td>
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<td>4:30 PM—5:00 PM</td>
<td><strong>Four Pillars of Stress Management</strong></td>
<td>Jeannie Martingano, JeannieFit Wellness Champion</td>
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<td>5:00 PM—5:30 PM</td>
<td><strong>Advocating for the Industry and Consumers: Pay Day and Signature Loans</strong></td>
<td>Tina Pollard</td>
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<td>5:30 PM—6:00 PM</td>
<td><strong>Motivational Interviewing: Financial and Career Coaching and Closing Remarks</strong></td>
<td>Heather Aiello</td>
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