Financial Education Committee
Monday, April 6, 2015
Meeting Minutes

Attendance: Chris Carleton – Chair, Lori Poole, Andy Sathe, Julie Heath, and Sue Heilmayer

Welcome
Chris Carleton welcomed the committee

Stock Market Game:

- Spring and Year Long games updates were reported by Sue Heilmayer.
  - The Spring and Year Long games will finish on April 17th. The Spring game has 1,059 teams participating, which meets the Center’s FY2015 goals.

- Planning for the Portfolio Challenge
  The first place teams from each of the three grades of the Fall, Year Long and Spring games are invited to make a presentation. The 2nd and 3rd place teams are invited to come observe, take the tour and attend lunch.

  The Portfolio Challenge Schedule:
  **Date: April 28, 2015**
  9:00 am Presentations: Room 400B Tangeman University Center (TUC)
  11:30 am Student take UC Campus Tour
  12:00 pm – 1:00 pm Lunch/awards: Faculty Club, Room 850 Lindner Center

  The judges for the competition are: Chris Carleton, Lea Ann Stevenson, Jeff Kerstine, Mike Hales and Brandon Zureik. Ohio National will send a representative to present the awards at lunch.

  Sponsorships – Julie Heath asked the committee if they saw opportunities for sponsorship for the Stock Market Game. Andy mentioned several possible sponsors: Western Southern, Fifth Third Bank and First Group (First Student). Lori suggested that Huntington Bank may be a viable sponsor. Sue will discuss with Holly Kohls the possibility of developing a potential list of sponsors for SMG and various levels of sponsorship. Ohio National is the current sponsor for the Portfolio Challenge. It was agreed to not seek additional sponsors for this event currently.
TL2

- There is one confirmed sponsor for TL2 students. Bank of America is due to respond soon concerning sponsorship. The class is capped at 40 students.

Competitions/Events

- Personal Finance Challenge
  Registration: 3/1-3/31
  Online Competition: 04/1-04/30
  State Finals: 05/7 Columbus, OH
  National Finals: 05/22 Kansas City, MO
  20 teachers with 100's of teams are participating. Fidelity is sponsoring and judging the Challenge in Columbus.

- Art Contest/greeting cards Update – The donations from the luncheon for the cards covered the printing expense. Chris suggested that the cards could be sold in the StEP stores in the future. The Center is also using the cards to correspond with donors. Committee members received cards.

- Market Madness, May 14, 2015
  Fifth Third Arena. Accenture is sponsoring the event and providing prizes. 1,200 students are expected to attend. The event runs from 9:00 am to noon.

It was discussed that it would be beneficial for the Financial Education Committee and StEP Committee to combine. Erin will verify with the STEP Committee and a combined Committee meeting will be scheduled. For now, we will assume that the combined committees will meet at the times below.

2015 Meeting Schedule
Meetings to be held at the Economics Center, 225 Calhoun Street, Room 359

Thursday, June 18, 2015       8:30 a.m.-9:30 a.m.
Wednesday, September 9, 2015  8:30 a.m.-9:30 a.m.

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