



## **Financial Education Committee**

**October 15, 2008**

### **Introductions:**

The following committee members were in attendance: Kate Beck, Cynthia Shore, Mary Philbin, Karyn Hausknecht, Cathy Braniecki, Stephanie Smith, Laurie Schaller, Bonnie Oliver, Justin Moscati, and Nicole Juzdowski.

### **Financial Education Survey:**

Justin provided the committee with a preliminary overview of the financial education survey results. He reviewed the summary which pointed out that we have received 52 responses thus far and also listed the most and least often offered curricula. The committee asked Justin to send them a list of those who have completed the survey as well as those organizations and individuals who have not; upon receiving this list, the committee plans to urge those whom they know to complete the survey. Please let Justin know who you will be contacting from the list. The committee also discussed briefly how they would like the financial education survey report to take shape. It was decided that the survey results should be presented in a way that serve the objectives and goals of the reasons the committee first decided to conduct the survey.

### **CASH Coaches Update:**

Nicole informed the committee that CASH Coaches now has 15 trained Coaches and about the same number of clients. The next training will be scheduled for either the last week of October or first week of November, most likely on Wednesday afternoon and Saturday morning; please let Nicole know if you or someone you know is interested.

### **CASH updates:**

**Free Tax Prep:** The committee was alerted about the upcoming opportunities to volunteer with the Free Tax Preparation Network and was given copies of the new CASH Free Tax Preparation Volunteer brochure and informed about the volunteer opportunities listed online.

**Income TAXi:** The committee will be kept posted on the volunteer numbers for the income TAXi and dates and times of training with UB students.

**Committee Updates:**

It was announced that CASH plans to form a specialized groups committee which will be run by CASH Intern Bonnie Oliver. The committee is set to have its first meeting sometime in mid November. It was suggested by the committee that attempts were made to reach out to local community groups who already work with these populations. If committee members are interested or know individuals and organizations who would be interested, please contact Bonnie at 716-887-2747.

Kate Beck informed the committee that Consumer Credit Counseling will be having a function at ECC North on October 25, 2008 from 10 am – 1 pm. Contact Kate for details (716-712-2060).

Stephanie Smith updated the committee on the success of Jericho Road Ministries success in its “Financially Fit” program from this summer where 21 women graduated. Jericho Road was to continue similar programming and to do so is looking for a new instructor; if committee members have any names or ideas please contact Stephanie (716-531-3450).

Laurie Schaller told the committee about Child and Family Services work with the Attorney General’s office on Medicaid Collection accounts and asked the committee to contact her regarding any similar situations they come across (716-882-0555\*307).