



Women and Financial Independence
The Smith College Financial Education Center
Calendar of Activities for 2007-2008

COURSES

Fall 2007: **Financing Life** taught by Professor Randall Bartlett (Economics)

Spring 2008: **Principles of Investing** taught by Professor Roger Kaufman (Economics)

LECTURE SERIES

How Do I? The Practical Steps to Financing a Life

September 20: **Choosing the Right Financial Planner** by Amy Jamrog, The Jamrog Group, Northwestern Mutual Financial Network

September 27: **The Secret History of the Credit Card** a documentary by PBS Frontline

October 4: **Taking the Mystery Out of Tax Forms** by David Pascucci, Romano, Pascucci & Co., P.C.

October 18: **The Home Buying Process Explained** by Michele Morris, Homeownership Center, Valley Community Development Corporation

October 25: **Think Your Identity is Safe?** By Kim Hackworth, UMass Five College Federal Credit Union

November 8: **Surviving Your Student Loans** by Alex Bickford, Citizen's Bank Education Finance Program

November 15 & 16: **Mock Financial Planning Intake Workshop** by Amy Jamrog and Tiffany Ross, The Jamrog Group, Northwestern Mutual Financial Network

February 14: **Getting Started Investing** by Sharon Tilden and Jonathan Ball, Smith Barney Investments

February 21: **Keeping Track of Your Investments** by Sharon Tilden and Jonathan Ball, Smith Barney Investments

February 28: **Making It Your Way – Becoming an Entrepreneur** by Brenda Wishart, Wishart Consulting and Harold Grinspoon Entrepreneurship Initiatives Program Director

March 6: **Can You Get the Money You Need? Tips for Effective Business Pitches** by Susan Jaye-Kaplan, GoFit, Inc.

April 3: **Asset Allocation Strategies in Your 20s, 30s and Beyond** by Jonathan Ball and Craig Strassel, Smith Barney Investments

WORKSHOPS

August 8: **It Really Is All About the Benjamins** by René C. Heavlow for The Care Center

August 15: **Let's Talk About Financial Career Options** by Mahnaz Mahdavi for The Care Center

September 4: **Dollars & Sense** by Mahnaz Mahdavi for Incoming Smith Students

October 30: **Living Off the Future – Borrowing, Credit and Debt** by Randall Bartlett for Delta Sigma Theta Sorority

November 5: **Fundamental Stock Analysis** by Roger Kaufman for the NYC Alumnae Investment Club

November 8: **It Really Is All About the Benjamins** by René C. Heavlow for the Smith BRIDGE Program

November 13: **The Art of Making it Possible to Live the Life You Want to Live** by Randall Bartlett for Keena State University

March 8: **The Importance of Financial Literacy** by René C. Heavlow for the Alumnae Association "Building Community" conference



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- April 8: **Money Matters** by Sophinna Singh '10 and Tracy Kimball '08 (POP) for the Skills Enrichment and Training Program in Holyoke, MA
- April 9: **It's Your Money** by Sophinna Singh '10 and Tracy Kimball '08 (POP) for the CHOICES program in Holyoke, MA
- April 10: **WFI - Working for Adas** by René C. Heavlow for Ada Comstock Scholars
- April 11: **Subprime Mortgage and Credit Crisis - A Global Perspective** by Mahnaz Mahdavi for the Smith Club of Charleston, South Carolina
- April 11: **Understanding Credit** by Anne Alquist AC'10 and Sara Smyth '08 (POP) for The Care Center in Holyoke, MA
- April 11: **Building Good Credit in College** by Anne Alquist AC'10 and Sara Smyth '08 (POP) for MassMutual Scholars at The MacDuffie School in Springfield, MA
- May 14: **Backpack to Briefcase** by Randall Bartlett for 2008 Graduating Seniors
- June 12: **Test Your Financial Savvy** by René C. Heavlow for the Smith Club of Hartford

WFI TEAS

- September 20: **E*Tea** with Susannah Howe (Engineering) and René C. Heavlow, co-Grinspoon Advisors
- October 4: **E*Tea** with Claudia Chan '98, CEO of Schecky's
- October 25: **E*Tea** with Paul Silva, Angel Catalyst and UMass Entrepreneurship Initiatives
- November 2: **Student Loans – You Have Questions, We Have Answers** by Kelly Heaney '08 and Molly Chadis '08 (WFI Interns) for Tyler House
- February 28: **Student Loans – You Have Questions, We Have Answers** by Molly Chadis '08 and Martha Woerner '08 (WFI Interns) for Lamont House
- March 8: **Investing 101 – Do You Know the Difference Between a Stock and a Bond?** by Shaoli Ghosh '08 and Selena-Renee Russ '08 (WFI Interns) for Talbot House
- April 13: **Use, But Don't Abuse, Your Credit Cards** by Elizabeth Costa '08 and Kelly Heaney '08 (WFI Interns) for Scales House

OTHER ACTIVITIES

- August 27, 31 & September 4-5: **Central Check-In** for all students; information table featuring Financial Jeopardy.
- September 13: **So You Want to Work on Wall Street** panel with alumnae from Bank of America and Deutsche Bank. Cosponsored by the Career Development Office.
- September 14: **WFI and You** an information session with WFI faculty and staff, as well as representatives from SCIC, SmiThrift, POP, and Grinspoon.
- October : **WFI and Northampton Public Schools** an information table for educators in the Northampton school system regarding the Peer Outreach Program financial workshops.
- November 7: **HGCF Entrepreneurship Conference** in Springfield, MA.
- January 23: **WFI Partners Meeting** an update about the program with Randy Bartlett, Annie Parker AC'08 and Mara Grbenick '07
- February 8: **WFI and You** an information session highlighting Spring semester activities.
- March 3, 5 & 7: **Financial Literacy – A sound investment** information table to highlight National Consumer Protection Awareness week featuring Financial Jeopardy.



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March 7: **WFI on the Road** with Mahnaz Mahdavi, Esther Smigel '08 and Annie Parker AC'08 for alumnae at Fidelity in Boston.

March 12: **5th Annual Elevator Pitch Contest**

April 14: **WFI and Adas** an information table to highlight the program for students admitted to the Ada Comstock Scholars program

May 17: **Ivy Day 2008 Open House** for alumnae, graduating seniors and their families.

May 24: **Reunion 2008 Open House** for alumnae and their families.