LOUISIANA
Asset Funders Network

Financial Health Matters:
Innovations and Strategies to Empower Louisianans

July 24, 2019
10:00 AM to 12:00 PM
Funder Discussion and LA AFN Steering Committee Meeting to Follow

Café Reconcile
1631 Oretha C. Haley Blvd
New Orleans, Louisiana 70113

Agenda

10:00 AM	**Welcome & Introductions** Erika Wright, Vice President, Louisiana, Tennessee, and Missouri Global Philanthropy, JP Morgan Chase
10:15 AM	**Framing the Issue: Why Financial Capability is Crucial at the Macro and Micro Level** Joshua Sledge, Financial Health Network
10:45 AM	**Financial Capability Innovation in Louisiana: A Panel Discussion** Jesus Gerena, Family Independence Initiative Patricia Sullivan, Change Machine/The Financial Clinic Suzanne Torregano, Kingsley House Ben Allen, PerkUp Financial Health Moderator: Isabel Barrios, Greater New Orleans Foundation
11:50 AM	**Funder Reflections** Christine Jordan, Entergy
12:00 PM	**Adjourn**
12:10 PM	**LA Asset Funders Network Funders Discussion***
1:00 PM	**LA Asset Funders Network Steering Committee Meeting***
1:30 PM	**Adjourn**

Funders and invited speakers only, please

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Biographies

Featuring: Joshua Sledge of the Financial Health Network

As a Senior Director on the Financial Health Network's Program team, Josh supports innovative financial services providers working on solutions to improve consumer financial health. His work includes managing relationships with the Financial Health Network member organizations, conducting consumer and industry research, advising companies on strategy and product design, and leading initiatives designed to support and foster new financial health solutions. Among other topics, he has particular expertise on the small-dollar credit industry and nonprofit innovation.

Before joining the Financial Health Network, Josh was a Senior Investment Analyst at Prudential Capital Group, an investment division of Prudential Financial. Josh earned an M.A. in Liberal Studies from Northwestern University and a B.A. in Business Administration from the Ross School of Business at the University of Michigan.

Isabel Barrios
The Greater New Orleans Foundation

Isabel fell in love with New Orleans as an Americorps service member. From that experience on, she immersed herself in the local nonprofit community. She worked at the University of New Orleans Women's Center, the International Project for Nonprofit Leadership, and as a local research assistant for the University of Pennsylvania. Most recently, Isabel worked at a real estate firm and gained first-hand knowledge of the need for affordable housing and neighborhood revitalization in post-Katrina New Orleans. This experience compelled her to engage in work with broader impact and led her back to her nonprofit vocation. She joined the Foundation in December 2009 as a Program Assistant, and now serves as a Program Officer. Isabel has a bachelor's degree in anthropology from the University of New Orleans.

Jesús Gerena
Family Independence Initiative

Jesús joined FII in 2010 as Executive Director of Boston, where he grew FII to include 800 families across the city. He assumed the position of CEO in 2017. Prior to joining FII, Jesús worked for the Hyde Square Task Force, where he served as Deputy Director and worked on the Youth First project that helped lay the groundwork for a proposed $250 million urban development project.

Jesús has held numerous Board leadership positions across New England and currently sits on the Boards of The Community Builder and English for New Bostonians. He is also a co-founder of the Community Fellows Program at the Institute for Nonprofit Management and Leadership affiliated with Tufts University's Johnathan M. Tisch College of Citizenship and Public Service. In 2016, the Boston-based Barr Foundation awarded Jesús a Barr Fellowship for his contributions to the city and his potential to drive positive change.

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Patricia Sullivan
The Financial Clinic

Patricia Sullivan joined The Financial Clinic in September 2018. As Assistant Director of Capacity Building, she works with partner organizations across the country to help embed financial security strategies into their services through training and organizational development.

Prior the joining the Clinic, Patricia managed financial literacy programming at the nonprofit Ladder Up, where she developed a financial coaching initiative to serve working Chicago families. Part of this work included integrating Change Machine's unique tools and resources into the program's existing structure.

Patricia received her B.A. in Geography and Urban Studies from Temple University.

Suzanne Torregano
Kingsley House

Suzanne Torregano led the initial implementation of the two generation, whole family approach at Educare New Orleans as the Family Support Manager. Ms. Torregano is a member of the Greater New Orleans Foundation's Economic Opportunity Community of Practice and participates in the Aspen Institute's Ascend program. Suzanne holds a Master of Business Administration degree with a concentration in Healthcare Management.

With over 15 years of project management experience, Suzanne serves as the Kingsley House Parent, Family, and Community Engagement Specialist. She uses this experience in her current role as she established community partnerships, recruits/supervises parent volunteers, provides direct supervision to Kinsley House Family Advocates, and administers the Financial Literacy training program.

Ben Allen
PerkUp Financial Health

Ben Allen in the founder of PerkUp Financial Health, an online financial wellness platform that is offered to employees of participating companies. PerkUp combines financial literacy with innovative financial products aimed at strengthening the financial health of employees. Mr. Allen is also the co-founder and Chairman of Dolphin Debit Access, a national provider of hardware and technology services for community banks and credit unions. Prior to founding Dolphin Debit Access in 2006, Mr. Allen worked for 13 years as an investment banker with Lehman Brothers and Merrill Lynch & Co. Mr. Allen has extensive experience in mergers and acquisitions, strategic assignments, and capital-raising for companies of all sizes. Mr. Allen received a BBA in Finance from Texas A&M University and an M.A. in Economics from Johns Hopkins University.

Mr. Allen is a co-founder and Vice Chairman of the New Orleans Startup fund, a public-private venture development fund that was formed to provide seed capital and technical expertise to early-stage businesses in New Orleans. He currently serves as Board Chairman of the New Orleans Ballet, and as a Board Member for the Youth Empowerment Project. He previously served as the Board Chairman for KIPP New Orleans, a charter school organization that serves more than 5,000 students across New Orleans.

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Erika Wright
JPMorgan Chase & Co.

Erika Wright is a Vice President for Global Philanthropy at JPMorgan Chase & Co., where she directs the Foundation's philanthropic investments across Louisiana, Tennessee, and Missouri. Erika oversees a portfolio of economic development, nonprofit, educational, and research partners dedicated to increasing economic opportunity through a combination of workforce, small business, community development, and financial capability initiatives. Prior to joining JPMorgan Chase, Erika served as the Program Lead for Violence Prevention in the New Orleans Health Department, where she guided the development of a continuum of services for African American males at risk for involvement in violence.

Erika received her undergraduate degree from Morgan State University in Baltimore, MD and served as an English teacher in the U.S. Peace Corps, prior to pursuing her Masters in Social Work from Washington University in St. Louis.

Christine Jordan
Entergy Charitable Foundation

Christine Jordan serves as Senior Lead Program Specialist in corporate social responsibility for Entergy Corporation, headquartered in New Orleans, Louisiana. In this capacity, Christine develops, implements, and benchmarks contribution strategies that benefit the communities Entergy serves while simultaneously creating business value.

Christine has 19 years of experience in corporate social responsibility, and over 6 years in print and visual media. She began her career as a staff write at the Boca Raton News in South Florida, and then become editor at Third World Press in Chicago. After earning a Master of Fine Arts in Film and Video Production from Northwestern University, Christine transitioned to freelance filmmaking. Prior to joining Entergy's corporate social responsibility department, Ms. Jordan worked in the communications department providing multimedia services.

Ms. Jordan graduate Magna Cum Laude with a Bachelor of Arts in Communications from Florida State University. She went on to earn a Master of Fine Arts in Film and Video Production from Northwestern University in Illinois. Her leadership training includes The Wharton Institute and NORLI (New Orleans Regional Leadership Institute).

Christine resides with her family in New Orleans, where she has roots four generations deep.