MAKING MORE POSSIBLE

with a

Minor in Financial Planning

College of Business

Delaware State University

FINANCIAL PLANNING PROGRAM

Financial Planning & Investment Club

"Promoting Financial Literacy"

Meeting Industry Needs




CFP-Board Registered Financial Planning Program
Delaware State University
1200 N Dupont Hwy Dover, De 19901

Friday, March 17, 2017

Society of

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Delware State University's CFP Board-Registered Financial Planning Minor

Delaware State University's CFP-board registered Financial Planning Minor Program is the second HBCU to offer such a program in the College of Business. The financial planning minor at Delaware State consists of courses which provide students with vital knowledge of the financial planning profession and prepare students for the CFP Exam upon graduation.

Students follow an excellent curriculum taught by passionate teachers while the program's Director, Dr. Nandita Das, assures each student gets useful exposure to the financial service industry.

Given the lack of diversity within the financial planning field, there is a paramount need for Certified Financial Planners and professionals of color as well as women. By offering this minor program, Delaware State University seeks to change the face of the average financial planner and also, make the financial services industry more accessible to minorities.

Financial Planning minor is open to students from all fields of study. Students and career changers will be able to make their mark in the financial planning profession and their community while embarking on a rewarding profession.

AGENDA

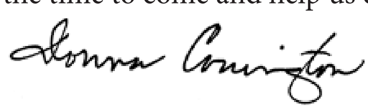
Meet and Greet .... *2:00pm - 2:30pm*
Panel Session .... *2:30 pm - 3:30pm*
Break/Networking Time .... *3:30pm - 4:00pm*
Formal Press Release *4:00pm*

Followed by Reception

A Welcome Message

Ms. Donna Covington, Dean of College of Business

"It is my pleasure to welcome you to Delaware State University and to the College of Business. The development of a CFP component for the Finance program falls under the outreach and engagement strategic aim, which includes the development of academic programs that serve underrepresented groups and underserved communities. There is a need for diversity in the Financial Services industry and the Financial Planning minor at Delaware State University will help meet this need while serving the community, both in terms of training graduates to become financial planners and also serving Kent County residents through financial literacy workshops and pro-bono financial planning. On behalf of our faculty and students we welcome you today and thank you for taking the time to come and help us celebrate this excellent achievement."



Dr. Nandita Das, CFA, CFP ®, Director, Financial Planning Program

"During the past few years, the College of Business has implemented new aspects to existing programs that increase students' preparedness for professional career. The development of the CFP-board registered Financial Planning minor is another step in this direction, as it aligns with our goals in preparing students for professional careers.

Delaware State University has a long history of supporting communities by preparing students for the professional life and meets their goal of serving their community while being successful professionally. CFP-board registered Financial Planning Minor is another way to help them transition. Access to finance and financial services is still a hurdle for many communities. Delaware State University has a vested interest in changing this. Financial Planning is crucial and should be accessible to all.

I would like to take this opportunity to thank the administration, the industry participants, the CFP-board for making this happen. It would be amiss not to mention the group of students who worked by my side and never gave up on this dream."

Meet The Panelists

Erin Arvedlund - Philadelphia Inquirer

Erin Arvedlund began her career as a reporter at Dow Jones newswires. From 2003 to 2005 Erin reported on business and politics in the former Soviet Union for The New York Times. She also has Wall Street experience, having worked in the hedge fund industry at Sanford C. Bernstein private bank at Alliance Bernstein.

She writes a weekly column for The Philadelphia Inquirer on personal finance. Her first book was "Too Good To Be True: The Rise and Fall of Bernie Madoff" (Penguin 2009) and her most recent book "Open Secret" (Penguin 2014) addressed the scandal surrounding the rigging of interest rates.

Lazetta Rainey Braxton - Financial Foundations, MBA, CFP®

Lazetta Rainey Braxton is founder and CEO of Financial Fountains. A certified financial planner, she provides financial planning and investment management services to individuals, families and institutions. She has served as a columnist for the Journal of Financial Planning and a guest blogger for DimeSpring, and has been featured in national media such as The Wall Street Journal, Kiplinger's, Black Enterprise, Investment News and Diversity Woman magazine. Braxton also speaks regularly on financial planning topics.

Pamela Capalad - Brunch and Budget

Pamela Capalad is a Certified Financial Planner™ and has been in financial services since 2008. She founded Brunch & Budget to give adults who felt ashamed or embarrassed about money a safe and friendly place to talk about their finances and make real financial progress. She is also passionate about empowering youth to understand and master their relationship with money and co-founded Pockets Change, where she co-facilitates hip hop + finance workshops for kids, teens, and college students across the country. Catch her and her husband on their weekly podcast on personal finance & social justice at brunchandbudget.com/podcast.

Rianka Dorsainvil - YGC Financial Planning Firm
Rianka R. Dorsainvil, CFP® is the Founder and President of Your Greatest Contribution (YGC), a financial planning firm serving entrepreneurs and professionals. Rianka served as 2016 National President of Financial Planning Association's NexGen community, sits on CNBC's Financial Advisors Council, volunteers annually with the IRS Volunteer Income Tax Assistance (VITA) program, and co-founded a mentorship program for women in financial planning at her alma mater, Virginia Tech. Rianka has been recognized by Investment News as 2015 top "40 Under 40", and in Wealth Management and Financial Advisor Magazine's 2016 list of top 10 CFP® holders.

Deborah Owens - TV One; Financial Expert. Media Personality.
Owens Media Group provides leadership, sales, financial acumen training and coaching for individuals and organizations. We assist organizations with the professional development of high potential emerging leaders. Our innovative training incorporates a framework of seven critical success factors derived from our research and published works. We have a track record of increasing employee engagement, leadership effectiveness, and goal achievement. Our training provides unique insights that show employees how to take ownership of their success and drive results in your organization.

Christopher S Smith - Edward Jones Financial Adviser
Chris began his career in 2008 as an Edward Jones financial advisor and currently leads the Edward Jones office in downtown Dover, DE. He is a limited partner with Edward Jones.
He holds an MBA both from Hampton University in Hampton, VA. Chris earned a Certificate in Financial Planning from Georgetown University in Washington, DC. He is a Certified Financial Planner (CFP) and AAMS. Chris works with other professionals such as CPAs, attorneys and other professionals to help determine the most appropriate financial strategy for clients of all stages of their investing life

Jocelyn D. Wright, MBA, CFP® is The American College State Farm Chair for Women and Financial Services and an Assistant Professor. Jocelyn functions as the Center's director and chief ambassador in leveraging research and education to create broad awareness of the challenges and opportunities that pertain to women and financial services.
In addition, Jocelyn is the Founder of The Ascension Group and has been working with individual clients since 2002. She received a BS in Business Administration (Finance) from the University of Delaware and earned her MBA in Finance at Howard University, graduating with Beta Gamma Sigma honors.

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UPCOMING EVENTS: APRIL 22, 2017

Pro-bono Financial Planning Day for the community with one-on-one sessions operating on a rotating cycle. The attendees will have the opportunity to access the services of a financial advisor free-of-charge.