A PLC for Administrators
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Network with district leaders from your region and beyond to solve challenges that you’re facing right now

**Learn**
Drive change within your community using the knowledge and skills gained from leaders in education, business, & more

**Lead**
Share your experiences and shine a spotlight on the accomplishments of your district in PDs, articles, social, & more

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AGENDA

- SPEAKER INTRODUCTIONS
- TOPIC OVERVIEW - Financial Education Legislation Landscape
- EXPERT VIEW - Hear from our guests, Adam Motter and Susan Bistransin
- PANEL DISCUSSION
- CLASSROOM RESOURCES
- Q&A
District Strategies to Master Financial Literacy Mandates

Adam Motter
Learning Specialist, K-12, Social Studies & Physical Education
Akron Public Schools

Susan Bistransin
Financial Education and Empowerment Coordinator
Prince George's County Public Schools

Diana Bravo
Vice President, District Relationships
EVERFI

Kaitlin Boldt
Director, K12 District Partnerships
EVERFI
Financial Education Landscape
Financial Education Legislation in 2022

- **Seven states** now require a stand-alone financial literacy course as a high school graduation requirement.
- **Five additional states' requirements** take effect in the next year or two.
- **25 states mandate at least some financial training**, sometimes as part of an existing course.
- **This year, another 20 states** have considered setting or expanding similar rules.
- **34 states** and the District of Columbia have had bills addressing financial literacy in the 2021-22 legislative sessions.
Financial Education Legislation
COVID really opened peoples’ eyes to how financially precarious people are, in the way they live their lives. In addition to that, it’s gotten really easy for anyone, including teenagers, to buy stocks and crypto. You’re dealing with youth that can, in 10 minutes, open a Robinhood or a Coinbase account. So these concepts are even more important now.

- John Pelletier, Center for Financial Literacy, Champlain College
Recent State Legislation

Florida just became the largest state to mandate personal finance education in high school

Ohio just became the largest state to require personal finance education in schools

Michigan is poised to become 14th state to mandate personal finance education

New Georgia law requires high school students to take financial literacy
Expert View:
Adam Motter, Akron Public Schools
Expert View:
Susan Bistransin, Prince George's County Public Schools
About Susan - General Role and Info

Susan Bistransin, NBCT
Financial Education and Empowerment Coordinator
Prince George’s County, MD

- National Board Certified Teacher, 2007, 2018
- 35 years classroom teaching experience
- Financial Literacy mandate advocate
- Md Council on Econ Ed Financial Capability Educator of the Year, 2015
- Teacher Mentor
- Society for Financial Education and Professional Development Curriculum Advisor.

Prince George’s County Public Schools
131,657 students
Prince George’s County, MD
PGCPS FINANCIAL LITERACY PROGRAM

- **April 2020**: PGCPS Board of Ed makes a semester course in Financial Literacy required for the class of 2024

- **April 2021**: Next Gen Personal Finance awards PGCPS a 3-year grant to fund a financial literacy specialist position, hired in Aug 2021

- **School Year 2021-22**: All schools teach a semester course in Financial Literacy to students beginning in grade 10.
Curriculum Model: Partnerships

1. Next Gen Personal Finance
   - Curriculum, Professional Development for Teachers, Contests for Students

2. Take Charge Today
   - Curriculum, PD for teachers, Demonstration videos for teachers

3. EverFi
   - Certification program, Curriculum, Webinars and Scholarship opportunities for students

   - Stock Market Game, Personal Finance Challenge, PD for teachers

   Teachers are also provided with a website containing all curriculum and PD information
School Year 21-22

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<tr>
<th>PGCPS HIGH SCHOOL PROGRAMS</th>
<th>PGCPS FIN LIT TEACHERS</th>
<th>PGCPS STUDENTS</th>
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TEACHER PROFESSIONAL DEVELOPMENT HOURS

PGCPS-HOSTED PD: 345 HOURS

NGPF ON DEMAND AND CERTIFICATION COURSES: 473 HOURS

MCEE PROGRAM TRAININGS: 42 HOURS
Expert View: Ryan McAllister, Intuit
Ryan McAllister leads Partnerships and GTM strategy for Intuit’s Job Readiness Program. The Job Readiness Program is a key pillar of Intuit’s Corporate Responsibility Strategy which aims to Power Prosperity Around the World through Career & Financial Readiness programs.

Ryan’s role includes:
- Oversees Strategic Partnerships where Intuit’s resources are implemented with educators and their students;
- Oversees School District/Board relationships around the world
- Serves an Innovation Catalyst with deep expertise in Design Thinking, Entrepreneurship and Personal Finance.

Ryan has an undergraduate degree in International Business from San Diego State University; and an MBA from University of Southern California. Ryan currently resides in Kauai, Hawaii with his wife and 2 children.
Panel Discussion
District Strategies to Master Financial Literacy Mandates

Susan Bistransin
Financial Education and Empowerment Coordinator
Prince George's County Public Schools

Adam Motter
Learning Specialist, K-12, Social Studies & Physical Education
Akron Public Schools

Ryan McAllister
REPLACE TITLE
Tell us about the financial education legislation in your state. How has it impacted your district’s financial literacy curriculum?

What are your district’s biggest priorities within financial education?

What challenges have you faced in implementing the curriculum?

What has the feedback from teachers and students been like? Any stories of impact you’d like to share?
Questions?
Classroom Resources
High School Financial Wellness Suite

Venture: Entrepreneurial Expedition
Grades 7-10

Marketplaces: Investing Basics
Grades 9-12

Money Moves: Modern Banking & Identity Protection ®
Grades 9-12

EVERFI: Financial Literacy
Grades 9-12

Pathways: Financing Higher Education
Grades 9-12
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