

Advancing Financial Literacy for Individuals with Disabilities

April 18, 2018,

1:00 p.m. - 3:00 p.m. EST

Municipal Securities Rulemaking Board

1300 I Street, N.W., Suite 1000

Washington, DC 20005

1:00 Welcome and Introduction

- Lynnette Kelly, President and Executive Director, Municipal Securities Rulemaking Board (MSRB)
- Jennifer Sheehy, Acting Assistant Secretary, Office of Disability Employment Policy, U.S. Department of Labor (*invited*)

1:15 Panel on the Role of Federal Agencies and Financial Regulators in Consumer Protection and Education

Multiple federal agencies and financial regulators have an important role in protecting all consumers, including individuals with disabilities, from exploitation and discrimination, promoting fair access to mainstream financial products and services. Each panelist will present an overview of his or her agency's regulatory activities and efforts to protect and educate consumers with and without disabilities to advance their financial stability and security.

- Moderator: Michael Morris, Executive Director, National Disability Institute
- Pamela Ellis, Associate General Counsel, Municipal Securities Rulemaking Board (MSRB)
- Luke W. Reynolds, Chief of Outreach & Program Development, Federal Deposit Insurance Corporation (FDIC)
- Don Dill, Senior Tax Analyst, Stakeholder Partnerships, Education and Communication (SPEC), Internal Revenue Service
- Mark Humphries, Acting Retirement Savings Education Campaign Coordinator, Employee Benefits Security Administration (EBSA)

2:15 Challenges and Opportunities to Improve Financial Capabilities

This panel represents leaders from the disability community who will share their personal and professional experiences on improving financial capability and inclusion for people across the spectrum of disabilities and their families.

- Moderator: Michael Morris, Executive Director, National Disability Institute
- Andy Arias, Policy Advisor, Office of Disability Employment Policy, U.S. Department of Labor (DOL)
- Oscar Jimenez-Solomon, Research Scientist, New York State Psychiatric Institute, Columbia University
- Maria Town, Director, Houston Mayor's Office for People with Disabilities
- Joseph Santini, Ed.S., Program Manager, Communication Service for the Deaf, CSD Learns
- Anil Lewis, Executive Director, Jernigan Institute, National Federation of the Blind

2:55 Closing Comments and Video

- Ritta McLaughlin, Chief Education Officer, Municipal Securities Rulemaking Board (MSRB)