

**Date**

August 5, 2025

Time

2:00-4:00pm

Location

1620 SW Upper Boones Ferry Road
Tigard, OR 97224

Microsoft Teams: [FEAT-Aug2025](#)

1. Welcome

State Treasurer Elizabeth Steiner, chair

2. New Member Introduction

Amy Theuma, Market President, First Interstate Bank

3. Financial Literacy Lessons from Massachusetts

Alayna Van Tassel, Director, Massachusetts Office of Financial Empowerment

4. Discussion: Advisory Team and meeting Oregon's financial empowerment challenges

Treasurer Steiner

Financial Empowerment Advisory Team

5. Update: 2026 Financial Wellness Scorecard planning

James Sinks, Financial Empowerment Program Manager

Amaury Vogel, Oregon Values and Beliefs Center

6. Update: Senate Bill 3 and youth financial education

Aujalee Moore, Oregon Department of Education

7. Roundtable

Financial Empowerment Advisory Team

8. Advisory Team business and advance calendar

Treasurer Steiner

9. Public comment and attendee introductions

Submit written public comments to FinancialEmpowerment@ost.state.or.us