



Date

Feb. 6, 2024

Time

2:00 - 3:30 p.m.

Location

WebEx:

<https://bit.ly/FEATFeb2024>

Event Password: N7Cem6q6u95

Access Code: 2499 707 6235

Phone: 1-408-418-9388

1. Welcome and remarks

State Treasurer Tobias Read, chair

2. Financial Wellness Scorecard and 2023 Oregon Personal Finance Survey

James Sinks, Oregon Treasury

Amaury Vogel, Oregon Values and Belief Center

Prem Mathew, Oregon State University

3. Personal Finance Education / Senate Bill 3 Implementation

Alexa Pearson, Director, Standards and Instructional Support, Dept. of Education

Aujalee Moore, Standards Guidance Program Analyst, Dept. of Education

Beth Wigham, Implementation Manager, Dept. of Education

Amit Kobrowski, Social Science Specialist, Dept. of Education

4. Roundtable discussion

Scorecard, financial education, goals and partnerships in 2024

5. Spotlight: Oregon Consumer Justice

Michelle Luedtke, Oregon Consumer Justice

6. Oregon refundable tax credits, 2023 tax year, and consumer education

Megan Denison, administrator, personal tax and compliance, Dept. of Revenue

7. Advisory team business and advance calendar

Treasurer Read

8. Public comment

