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Oregon State Treasury Forms Financial Education Advisory Team

December 29, 2020

New advisory group to focus on strengthening financial well-being across the state

Salem, OR—State Treasurer Tobias Read today announced the creation of an advisory team to guide Treasury's efforts to improve financial literacy across the state.

"Financial literacy doesn't solve inequity or systemic problems, it cannot lift a person or their family out of poverty, but it can provide a foundation for making confident financial decisions and avoiding predatory behavior in our financial marketplaces," said Oregon State Treasurer Tobias Read. "We're excited to work with this group to advance tools that help every Oregonian build a more secure future."

Led by Treasurer Read, the 15-member Financial Education Advisory Team brings together expertise from across Oregon. Members come from nonprofits in Central Oregon and Portland, from the Umatilla Tribe in Pendleton, and from the Consumer Credit Counseling Service in Medford. They include a counselor who helps military families, leaders from financial literacy nonprofits, and voices from the AARP, banks, and credit unions.

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The advisory group plans to meet five times in 2021, starting with a virtual meeting January 5, with the goals of better highlighting the importance of financial education, amplifying existing efforts in the public and private sectors, and addressing gaps to make financial education more accessible to people when they need it most. The panel will also discuss potential ways to improve financial awareness in the midst of the ongoing COVID-19 pandemic.

Oregon State Treasury currently offers a trio of empowerment programs that allow Oregonians to save toward a more secure future. Programs include the first state-facilitated retirement program, OregonSaves, the Oregon ABLE Savings Plan for disability-related expenses, and the Oregon College Savings Plan for career training and higher education expenses. New financial education efforts will be aligned with these programs.

The Financial Education Advisory Team's meetings will be public, and the January 5 meeting can be accessed at https://bit.ly/3mYIdb9. (https://bit.ly/3mYIdb9.) For more information, please visit https://oregon.gov/treasury/your-money/Pages/Finan... (https://oregon.gov/treasury/your-money/Pages/Financial-Education-Advisory-Team.aspx.) In addition to Treasurer Read, the advisory team members are:

• Laura Aguirre, Oregon office, Mexican Consulate (Portland)
• Kate Benedict, Financial Beginnings Oregon (Portland)
• Scott Cooper, NeighborImpact (Redmond)
• Brent Hunsberger, Silver Oak Advisory Group/ former personal finance columnist (Portland)
• Gina Huntington, Junior Achievement of Oregon and Southwest Washington (Portland)
• Bill Ihle, Consumer Credit Counseling Service of Southern Oregon (Medford)
• George Katsinis, contract financial counselor, National Guard (Silverton)
• Alisha Langford, financial counselor for people with disabilities, Abeona Group (Milwaukie)
• Erin Moore, OnPoint Credit Union (Portland)
• Juanita Santana, AARP / former member, Oregon Retirement Savings Board (Portland)
• Karen Saxe, DevNW (Springfield)

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- Felicia Wells Thomas, Microenterprise Services of Oregon (Portland)
- Dave Tovey, Nixyáawii Community Financial Services (Pendleton)
- Shalare Vickers, Wells Fargo (Portland)

Oregon State Treasury improves the financial well-being of all Oregonians. Led by State Treasurer Tobias Read, Treasury provides low-cost banking, debt management, and investment programs for governments and empowers Oregonians to invest in themselves and their loved ones through the Oregon College Savings Plan, Oregon ABLE Savings Plan, and OregonSaves.

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