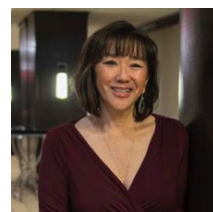


## State Coalition Leaders Meeting – August 31, 2022 Presenter Bios



**Corey Carlisle** is the Head of Public Policy and Social Impact for Varo Bank, the first consumer fintech to be granted a national banking charter in 2020. In this role, Mr. Carlisle is responsible for overseeing Varo’s global public policy functions, including activities that support the bank’s impact-focused mission and the Communities Reinvestment Act, as well as championing banking innovation driving financial inclusion and financial well-being with policymakers and industry stakeholders. He currently serves as Chair of the national Jump\$Tart Board.

**Laura Levine** has devoted her career to helping people of all ages better understand financial services through marketing and outreach, communications, and most recently, through education. In 2004, she became executive director of the Jump\$Tart Coalition for Personal Financial Literacy, a Washington DC-based nonprofit organization committed to “financial smarts for students,” and was named President and CEO in 2011.



As Senior Director of Education, **Dan Hebert** is Jump\$Tart’s principal liaison to our nation’s teachers, overseeing the Jump\$Tart National Educator Conference and the Jump\$Tart Financial Foundations for Educators programs. In addition to his national role, Dan helped to form the New Hampshire Jump\$Tart Coalition in 1999, an all-volunteer state affiliate of the national organization and has served as state president of NH Jump\$Tart since its formation.

**Rhonda Ashburn**, CFCS, is Executive Director of the American Financial Services Association Education Foundation. She is focused on the mission of educating consumers of all ages on personal finance concepts and helping them realize the benefits of responsible money management through the free web-based personal finance curriculum MoneySKILL®. To date, over 1.3 million users have enrolled in the program comprised of 37 different modules.



**Billy J. Hensley**, Ph.D., is president and CEO of the National Endowment for Financial Education® (NEFE®). Since his appointment in 2018, Hensley has led NEFE through the development and execution of its first strategic plan, sharpening the organization’s mission, vision and core values, and cultivating broader transparency and effectiveness. He is charging the organization to *Redefine Financial Education* through more focused philanthropy, research and collaboration. This is illustrated by the conception and interpretation of the Financial Well-Being Framework, a model for better accountability in the financial capability field.

**Melanie Mortimer** is President of the SIFMA Foundation, the nation’s leader in youth investor and financial education that ensures all young people, regardless of background, have access to transformative knowledge and tools to prepare for their financial futures. The SIFMA Foundation cultivates tomorrow’s workforce and prudent investors through programs that excite youth about the dynamism and opportunity inherent in the capital markets, while improving their STEM performance and critical life skills.



**Annette Fowler, M.S.**, NEFE’s senior director of Operations, leads the planning, direction and oversight of a broad range of service functions, including human resources, information technology, risk management, and office operations. Annette started with NEFE in 2015 as the director of eLearning, was promoted to managing director of technology three years later and became senior director in January 2021. She has over 30 years of experience in operations, information technology, business analysis and project management.

**William “Bill” Cheeks** is President of ABBA Associates Inc., a Powder Springs, GA-based fiscal management consulting firm that provides counseling and conducts seminars nationwide to help consumers map a successful Life Plan. The seminars are conducted for companies, governmental agencies and non-profit organizations. This firm has been in business since January 1, 2002. Bill was a consultant to the Jump\$Tart Coalition for Personal Financial Literacy, in that capacity, served as the Eastern States Regional Director, assisting and advising Jump\$Tart state coalitions in the region until December 31, 2020. He started the Coalition to Improve Credit Education in April 2016 and serves as the executive director.

