



General Partners Meeting-Bios

Jump\$Tart National Leadership



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. Under her leadership, Jump\$Tart launched the Jump\$Tart National Educator Conference, Jump\$Tart Financial Foundations for Educators and J\$FFE Online, Project Groundswell and Check Your School, as well as the coalition’s social media efforts.



As director of Schwab Community Services and Charles Schwab Foundation, **Casey Cortese** champions the firm’s national philanthropic and community efforts, overseeing the strategic execution of Charles Schwab Foundation’s mission, grantmaking and partnerships. She and her team also lead the company’s robust employee community involvement work, engaging 33,000+ Schwabbies in a series of signature national volunteer and service initiatives to drive impact in local communities across the country. Casey is the Chairwoman of the Board of the National Jump\$Tart Coalition for Personal Financial Literacy.



Raven Newberry, M.P.P., is NEFE’s managing director of Policy and Advocacy, leading NEFE’s advocacy efforts and elevating effective practices for policymakers, practitioners and other partners. She oversees the strategy for monitoring and analyzing legislation and policies tied to financial education on a statewide and national level. Raven joined NEFE in 2014. In her initial role, she supported the K-12, college, and adult education programs, including the High School Financial Planning Program (HSFPP), CashCourse, and Smart About Money. Raven earned her master’s degree in public policy, focusing on K-12 to higher education pathways, from Vanderbilt University and a bachelor’s degree in geography from the University of Kentucky.



Owen Donley serves as Chief Counsel of the United States Securities and Exchange Commission’s Office of Investor Education and Advocacy, where he manages a team of subject matter experts in providing public-facing content for retail investors on a broad variety of issues arising under the federal securities laws. He is especially focused on investor engagement through the lens of financial technology and media, particularly where digital and social communication intersect with retail investing. Owen has been cited in publications including The Financial Times, The New York Times, The Washington Post, CNNMoney, MarketWatch, SmartMoney Magazine, Consumers Digest, and Forbes.



Math and Personal Finance Panel



Rhonda Ashburn, CFCS, is the Executive Director of American Financial Services Association Education Foundation and current Vice Chair of the National Board of the Jump\$Start Coalition for Personal Financial Literacy. 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 1.4 million users have enrolled in the program comprised of 37 different modules available at moneyskill.org.



Suzy Koontz, Founder and CEO of Learn Thru Movement and Vice President of the National Math Foundation is an actuary, an educational consultant, a math teacher, and the creator of Math & Movement, Movement & Literacy and over 200 kinesthetic teaching tools. As the author of over 20 books, Suzy's passion is helping students recognize their ability to learn and lead healthier lives while achieving academic success. Suzy's work has been featured in television, radio, and print. Suzy is the co-author of an upcoming ASCD book on active learning.



Jack Marley-Payne researches issues in education, finance and mathematics, and creates materials for teaching and understanding these topics. Previously, they completed a doctoral dissertation at MIT that focused on understanding knowledge in light of psychological discoveries regarding our limited rationality, and taught undergraduate classes in philosophy and mathematics.



Olivia Valdes, Ph.D., Senior Researcher at FINRA Investor Education Foundation and **Jack Marley-Payne**, Director of Research at FiCycle, will present findings from two FINRA Foundation National Financial Capability Studies and explain the impact on financial education efforts. Following, **Rhonda Ashburn**, Executive Director, AFSA Education Foundation, and **Suzy Koontz**, President and CEO of Math & Movement will present, "Math and Finance: A Real Life Jump\$Start Partner Collaboration."



Math and Personal Finance Panel



Amina Carter's role at the Jump\$Tart Coalition has grown steadily since she joined the organization in 2015. Today, as Director of Operations and Marketing, she oversees Jump\$Tart's back-office operation, including billing, banking, and logistics. Additionally, she is the creative force behind many of the organization's marketing and branding efforts. Before joining the organization, Amina worked for 14 years in the field of insurance and financial services in sales and marketing and organizational strategy. There she helped build strong financial portfolios, manage client risk and plan for life's unexpected events.



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. He works closely with consultants on the Jump\$Tart Financial Inclusion Initiative and Check Your School Campaign. 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. A strong advocate for personal finance education, he has served as state president of NH Jump\$Tart since its formation.