



Our Financial Conference 2021



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**Our Financial
Conference**

Welcome to the first annual Our Financial Conference!

We are so very happy you are here!

This conference will be like no other because it is made up of local financial professionals who will be providing information that is timely and relevant to YOU and your fellow community members. We see and hear you on a daily basis, so we've tailored the conference specifically to regional challenges.

Today, you will meet some of the most amazing financial gurus in the area! They will give you tools and resources to succeed...whatever your focus is! And since this conference is in-person, you will make some great connections, not only with the educational team, but with your peers as well!

Since this is our first annual Our Financial Conference, please be sure to fill out the survey (see the green 1/2 sheet enclosed in this booklet and QR code). We want to hear from YOU so we can continue to meet the needs of the community.

We are committed to improving your financial wellness! Sit back and let your toolbox be filled! Thank you for being here!

The Our Financial Conference Team





Our Financial Conference 2021

VIRTUAL Conference Agenda
Password for All Rooms: **OFC2021**
October 1, 2021

- 8:45 – 9:15 am **Zoom Doors Open for All Participants** Grab your Coffee and a Snack.
- 9:15 – 9:30 am **Main Session** – Welcome and Introduction to Conference
<https://uidaho.zoom.us/j/89482136044>
 Karen Richel, University of Idaho Extension
- 9:30 – 9:40 am **Quick Break** – Our Main Session will be open during this time if you have questions
<https://uidaho.zoom.us/j/89482136044>
- 9:40 – 10:40 am **Breakout #1**
 Make Education an Affordable Reality – Nick Thiros, Ideal 529 Plan
 o <https://uidaho.zoom.us/j/83951242132>
 Simplifying Your Income Taxes – Megan Neilson, Palouse Tax Service
 o <https://uidaho.zoom.us/j/89692659767>
 What the Heck is Happening with The Housing Market? Panel
 o <https://uidaho.zoom.us/j/81765374184>
 ▪ Dave Clark – Columbia Bank
 ▪ Misty Curry – Latah Realty
 ▪ Tim Kinkeade – First Home Bank
 ▪ Nils Peterson – Moscow Affordable Housing Trust
 ▪ Jennifer Wallace – Palouse Habitat for Humanity
 ▪ Marlys Wilson – Latah Credit Union
- 10:40 – 11:00 am **Stretch Break** – Our Main Session will be open during this time if you have questions
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11:00 – 12:00 pm

Breakout #2

- Money Magic Archetypes and Clearing Money Clutter – Fran McCully, McCully Consulting Group
 - o <https://uidaho.zoom.us/j/89923850163>
- Setting Your Credit Score on Cruise Control – Laura Smith, Idaho Central Credit Union
 - o <https://uidaho.zoom.us/j/83181783305>
- Getting Ready for Retirement (Before and During Retirement) Panel
 - o <https://uidaho.zoom.us/j/82199020474>
 - Noreen Brisson – Idaho Department of Insurance, SHIBA
 - Kirk Larson – Social Security Administration
 - Rusty Schatz – D.A. Davidson
 - Justin Swift – Northwestern Mutual, Trail and Swift Financial

12:00 – 1:00 pm

Lunch with a Sponsor! Have a burning question that only a financial planner can answer? Or maybe a credit union or lawyer? Our sponsors are here to answer your questions in a Breakout Zoom Room. Grab your lunch and come enjoy Lunch with a Sponsor.
<https://uidaho.zoom.us/j/89482136044>

1:00 – 2:00 pm

Breakout #3

- Financial Apps: The Good, the Bad and the Ugly – Luke Erickson, University of Idaho Extension
 - o <https://uidaho.zoom.us/j/82382864881>
- Community – Powered (Financial Empowerment – Realizing Your Dreams) – Tatiana Morales, Idaho Women’s Business Center
 - o <https://uidaho.zoom.us/j/88644564037>
- Enjoying the Fruits of Your Labor (Post Retirement and Estate Planning) Panel
 - o <https://uidaho.zoom.us/j/83327860349>
 - o Nancy Ax – Idaho Department of Finance
 - o Rhonda Comstock – AARP
 - o Ellis Eifert – Eifert Law Firm
 - o Kristin Schmidt – Community Action Partnership, Area Agency on Aging & Community Services
 - o Justin Swift – Northwestern Mutual, Trail and Swift Financial

2:00 – 2:30 pm

Don’t Leave Yet... Final Comments and Door Prizes! Please come join us!
You are not going to want to miss the door prizes.
<https://uidaho.zoom.us/j/89482136044>

Thank you so much for being a part of this amazing conference!
See you in April for our LIVE Conference!!

Platinum Sponsors



**Idaho
Central**[®]
CREDIT UNION



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Laura Smith is the Vice President of Public Relations at Idaho Central Credit Union (ICCU). Her areas of focus are business development, social media, community involvement, event planning and media relations. Laura and her husband live in Pocatello and have two young boys. Laura enjoys being active with her family and in the communities where ICCU's members live and work.



Jenny Ford
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Jenny Ford is a Business Relationship Officer for Idaho Central Credit Union and is based in Moscow. Previous to her role at Idaho Central Credit Union Jenny served as the Executive Director for the Moscow Chamber of Commerce & Visitors Center. Jenny made strides in regard to collaborative private-public partnerships and elevated the Chamber to a more sophisticated organization for the community and local business owners in the City of Moscow, Latah County and the region. Jenny received her undergrad and masters at the University of Idaho and participates in several boards throughout the quad cities.

Platinum Sponsors



University of Idaho Extension *Latah County*



Karen Richel
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Karen Richel is a University of Idaho Extension Associate Professor in Latah County and is the Family Finance Extension educator for all ten North Idaho counties. Karen reaches residents with research-based information to help families build strong financial foundations and balanced lives. She caters to every age and socioeconomic group with one-on-one counseling/coaching sessions, classes, workshops, and simulations on topics ranging from goal setting and tracking expenses to retirement and end-of-life planning. Karen can reframe challenging past money memories (financial coaching), guide the way to managing resilient finances (financial education and counseling) and then help design a sustainable path to wealth planning (retirement and estate planning). Her educational background and certifications as an Accredited Financial Counselor® and a Certified Money Coach® allow her to provide all of these services to every resident.

Gold Sponsors



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Stacey Swift is the branch manager at Columbia Bank in Pullman. A thirteen-year veteran in banking, Swift has experience in all facets of personal and small business lending with a current focus on helping small businesses maximize their cash flow by connecting them to the tools and resources available at Columbia Bank. Swift relocated to Moscow in 2013 with her husband and their three children. She spends her free time coordinating the schedules of the entire family, coaching kids, playing softball and never leaves home without a folding chair, sunscreen and whatever attire the current sporting season requires.

Dave Clark is a mortgage loan originator for Columbia Bank. He works on a team that services over 20 branches along with our own book of business. He got his first taste originating mortgages in 2010 just after the housing market crash, so he has been able to experience the ups and downs along with old/new and always changing regulations. He is originally from Kennewick, WA, but from age 10 grew the rest of the way up in Moscow, ID until 2001 then he moved to LC Valley to be closer to water. When he's not originating mortgage loans, he is either playing in the rivers to some capacity, working for his clients or for his mobile DJ business (Hi Lariious Entertainment) that he's been owner/operator for over 20 years.



Marlys Wilson

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Marlys has worked in the financial industry for over 45 years starting out as a bank teller and holding various other positions. In 2002 she joined Latah Credit Union, where you can find her today, living the Credit Union philosophy of "People Helping People".

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Casey Holcomb-Hawkes

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Casey Holcomb-Hawkes is a small business relationship manager with Washington Trust Bank. She has over 20 years of experience in the financial industry and has spent the last 11 years focused on rural market success. Casey is passionate about community service, and serves on numerous non-profit boards, including United Way of Moscow/Latah County, and the Moscow Affordable Housing Trust.



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Kaitlin Jones is the founder and President of Northstar Financial Management, Inc. She is a fee only financial advisor with expertise in retirement, tax, budgeting, education, and divorce financial planning. She is a Moscow native who received her Masters in Family Financial Planning from Montana State University. She is a CFP[®] professional, Enrolled Agent with the IRS, and Certified Divorce Financial Analyst[®].

Mark is a former navy tailhook pilot whose last duty station was as an instructor at the University of Idaho and Washington State University. He joined Northstar in 2019 as an advisor to help people use their hard-earned pay and benefits to build the life and legacy they desire. Mark specializes in helping federal employees maximize their benefits, retirement planning, and creating smart investment strategies. He is an avid outdoorsman and conservationist who lives in Moscow with his wife and two girls.

Sponsors



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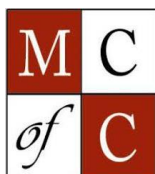
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We couldn't have done it without you!

Debra Rumford & Michelle Boese-Empey, University of Idaho's Extension Web Coordinators, for help in registration design

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Ember Powell, Program Coordinator & **Grace Meyer**, Program Assistant, at University of Idaho, Latah County Extension for help in event planning and design



See You Next Year!

**Watch your email for
next year's**

Our Financial Conference!

