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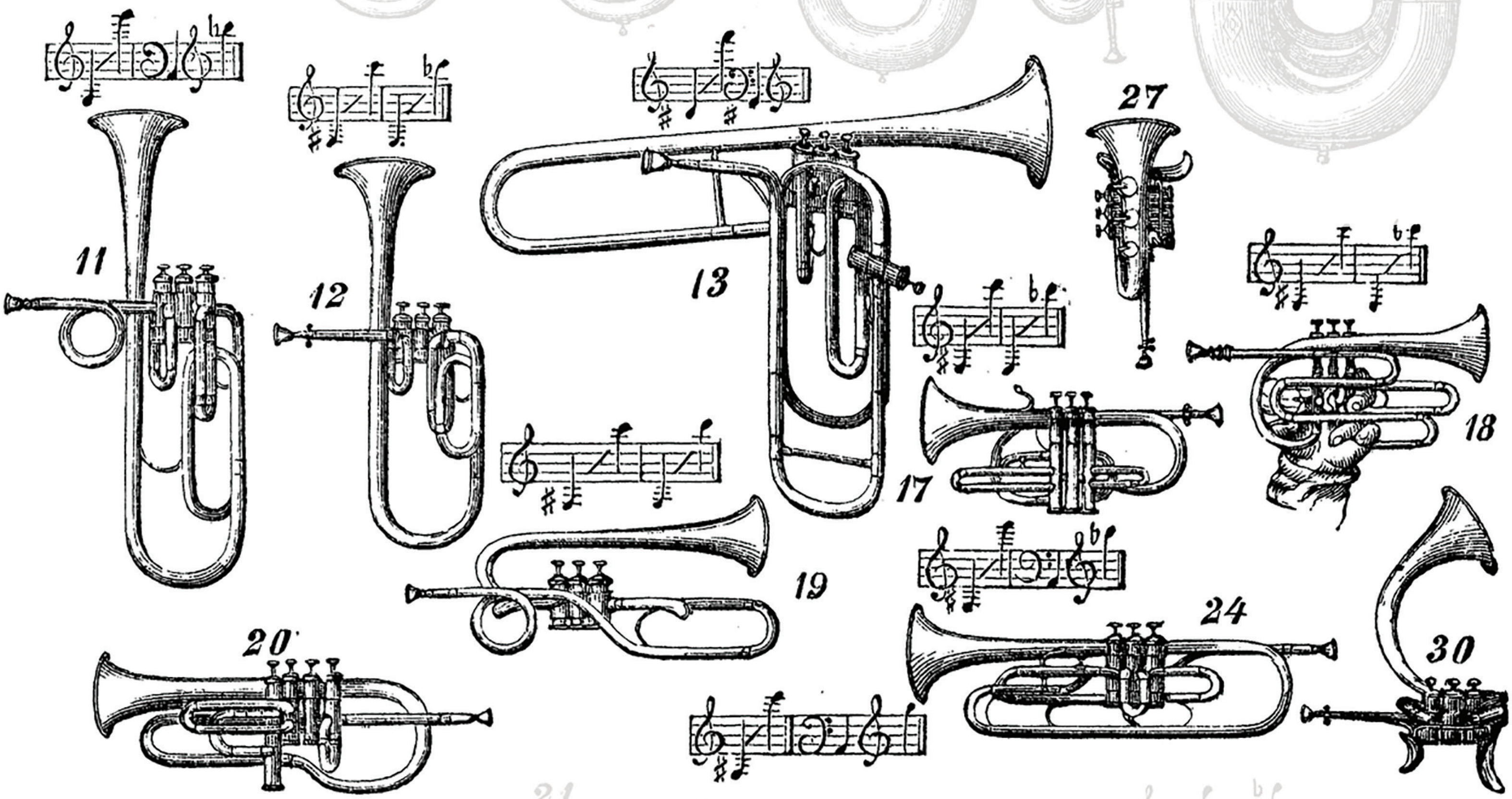
Nefe Digest

January/February 2018

Meet NEFE's Leadership



No one at NEFE works alone — at least not for very long. With nine websites spanning high school to retirement and activities ranging from funding academic research, to advising on personal finance educational standards, to regularly engaging with national media and government policymakers, NEFE's work is, at its core, collaborative.

Our programs and initiatives come together to form a cohesive whole, which is overseen by NEFE's Board of Trustees. They are experts in education, social services, technology, finance, communications, law and other disciplines. Their high-level vision and strategy guides our ensemble, contributing to its many initiatives and helping NEFE achieve its goals individually, in small task forces, or together as a body. Time to meet the top brass.

Nefe
National Endowment for Financial Education

The NEFE Board of Trustees welcomes a new chair, **David G. Strege,** CFP®, CFA, CKA®, senior financial planner at Iowa-based Syverson Strege and Company, and a new vice chair, **Patrick Bannigan,** chief operating officer at Kansas City, Mo.-based American Century Investments. The board also welcomes two new board members, **Doug McCormick,** co-founder and managing partner at HCI Equity Partners, and **Manisha Thakor,** CFP®, CFA, director of wealth strategies for women at Buckingham Strategic Wealth..

Doug McCormick • *Co-Founder and Managing Partner, HCI Equity Partners*

Doug McCormick received his MBA from Harvard Business School and his Bachelor of Science in Economics from the U.S. Military Academy at West Point. He served as a captain in the U.S. Army's 25th Infantry Division, receiving numerous awards for performance and achievement.

McCormick went on to work in the Investment Banking division of Morgan Stanley, where he was involved in the completion of mergers, acquisitions and related financing transactions. In 1999, McCormick joined HCI Equity Partners, becoming a managing partner in 2006. He currently oversees the origination, management and development of the firm's investments.

McCormick is a Henry Crown Fellow and serves on the boards of two veterans' service organizations: Team Red White and Blue, and Bunker Labs.

"Financial literacy is an increasingly important skill required to navigate today's dynamic economy and NEFE is well positioned to help," he says. "I was attracted to NEFE's great reputation and the opportunity to use my passion for improving financial literacy to have a positive impact on others."

We asked a few current board members, "What advice would you give your younger self?"

Ted Beck
NEFE President and CEO

Patrick Bannigan
Chief Operating Officer, American Century Investments
Read More: *Mar/Apr 2014 Digest*

Denise "Denny" Crawford
Securities Consultant
Read More: *Jan/Feb 2013 Digest*

"Take advantage of your 401(k). You won't miss the small amounts from each paycheck and it will grow super fast, tax free!"

Greg Maged
CEO, Bicycle Financial
Read More: *Spring 2016 Digest*

"Open an IRA with your first paycheck and minimize student loans. Saving is important — but so is having fun."

Kevin Plummer
Head of School, Tampa Preparatory School
Read More: *Spring 2016 Digest*

Merrell Bailey (Emeritus)
Managing Partner, Your Caring Law Firm
Read More: *Jan/Feb 2012 Digest*

Rick Ketchum
Retired Chairman and CEO, FINRA
Read More: *Spring 2017 Digest*

Manisha Thakor, CFA, CFP® • *Director of Wealth Strategies for Women, Buckingham Strategic Wealth*

Since earning her MBA from Harvard Business School, Manisha Thakor has worked as an analyst, portfolio manager and client relations executive. She founded her own firm, MoneyZen Wealth Management, and she shares her knowledge on a variety of media outlets, including *The Wall Street Journal's* Wealth Experts Panel and CNBC's Financial Advisor's Council.

Thakor has co-authored two acclaimed personal finance books: *On My Two Feet: A Modern Girl's Guide to Personal Finance* and *Get Financially Naked: How to Talk Money with Your Honey*. She also hosts "The MoneyZen Podcast," where she helps women and families learn tools and techniques to redefine their relationship with money and create financial lives aligned with their values. She hopes to continue that focus in her work on the NEFE Board.

"I have an extra soft spot for women's economic empowerment, so helping NEFE where I can identify ways and places that, from a research or implementation standpoint, this population can get access to empowering resources and information would be a dream come true," she says.

Joyce Nelson
Retired President and CEO, National MS Society
Read More: *Spring 2017 Digest*

David G. Strege, CFP®, CFA, CKA®
Senior Financial Planner, Syverson Strege and Company
Read More: *Mar/Apr 2013 Digest*

"Hey, younger Dave, be a better steward of what you receive so you can help more people."

Michael Bedke (Emeritus)
Partner, DLA Piper, LLP
Read More: *Jan/Feb 2011 Digest*

"Save 10 percent of each paycheck from Day 1. Really! And, remember, a Scout is thrifty!"

James Kooler, Ph.D. (Emeritus)
Administrator, California Friday Night Live Partnership
Read More: *Jan/Feb 2012 Digest*

"It is not your job to financially support your fiscally irresponsible elders, no matter how much you love them."

Helen Norris
Vice President and CIO, Chapman University
Read More: *Spring 2015 Digest*

"Pay yourself first. We don't all have to be wealthy, but we all can know how to make the most of the wealth we have."

Jason Young
Co-Founder and CEO, Mindblown Labs
Read More: *Spring 2017 Digest*

See back issues of Digest at www.nefe.org/Press-Room/NEFE-Digest.

National Endowment for Financial Education

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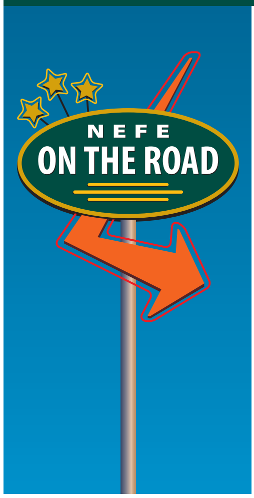
HOLIDAY CLOSINGS

NEFE will be closed Jan. 1 for New Year's Day and Feb.19 for Presidents Day.

Stop by Our Booth or Look for Us at the Following Conferences:



Mile High Society for Human Resource Management (SHRM) Conference	Jan. 19	Denver
National Academy of Social Insurance Annual Conference	Jan. 30-31	Washington, D.C.
National Council for Community and Education Partnerships (NCCEP) GEAR UP Capacity Building Workshop	Feb. 4-7	Las Vegas
National Resource Center Annual Conference on the First-Year Experience	Feb. 10-12	San Antonio
CFP Board Academic Research Colloquium for Financial Planning and Related Disciplines	Feb. 20-22	Arlington, Va.

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The mission of the National Endowment for Financial Education is to inspire empowered financial decision making for individuals and families through every stage of life.

All questions regarding *NEFE Digest* may be addressed to the Marketing and Communications department. Editor: Cara Hopkins. NEFE is open Monday through Friday, from 8:30 a.m. to 5 p.m. Mountain Time. The main telephone number is 303-741-6333; the fax number is 303-220-0838.