

# CALLING ALL HIGH SCHOOL TEACHERS! PREP FOR NEW FINANCIAL LITERACY REQUIREMENT



Earn continuing education credits at a **FREE** one-day Financial Literacy Seminar on **Friday, Aug. 4**, on UCF Main Campus! Breakfast and lunch will be included.

UCF Finance professors will cover the key financial literacy and money management concepts high schools teachers will need to teach under the new state law\*.

## Topics include:

- Types of bank accounts offered, opening and managing a bank account, and assessing the quality of a depository institution's services
- Balancing a checkbook
- Basic principles of money management, such as spending, credit, credit scores, and managing debt, including retail and credit card debt
- Completing a loan application
- Receiving an inheritance and related implications
- Basic principles of personal insurance policies
- Computing federal income taxes
- Local tax assessments
- Computing interest rates by various mechanisms
- Simple contracts
- Contesting an incorrect billing statement
- Types of savings and investments
- State and federal laws concerning finance

## FRIDAY, AUG. 4

TIME	SESSION	PRESENTER
7:30-8:30 am	Registration/Breakfast	
8:30-9:45 am	<b>Session 1: What Every Student Needs to Know About Money</b>	Prof. Paul Gregg
9:45-10 am	Break	
10-11:45 am	<b>Session 2: Banking, Consumer Credit &amp; Loans</b>	Prof. Denise Saunders
11:45 am-12:30 pm	Lunch	
12:30-1:45 pm	<b>Session 3: Taxes</b>	Prof. Paul Gregg
1:45-2 pm	Break	
2-3:15 pm	<b>Session 4: Understanding Stocks &amp; Bonds</b>	Dr. Yan Lu
3:15-3:30 pm	Break	
3:30-4:45 pm	<b>Session 5: Understanding Mutual Funds &amp; Retirement Investing</b>	Dr. Kevin Mullally

\*Dorothy L. Hukill Literacy Act

## SPEAKERS



**PAUL GREGG, MSA, CPA, Executive in Residence, Finance**, is a senior instructor at UCF. Since joining UCF in 2002,

more than 17,000 students from all majors have taken his Personal Finance & Investments class. He also teaches undergraduate and graduate level corporate finance classes.



**YAN LU, Ph.D., CFA, Associate Professor, Finance**, studies alternative investments and behavioral finance. Her

research has been published in many top journals and featured in CNN, NPR and the *Wall Street Journal*.



**KEVIN MULLALLY, Ph.D., Assistant Professor, Finance**,

researches institutional investors, financial markets

and behavioral finance. Previously, he taught high school mathematics and coached basketball in Jacksonville.



**DENISE SAUNDERS, Adjunct, Finance**, teaches Personal Finance & Investments (FIN 2100). She is the COO/CFO for Clearly Innovative Inc.,

a mobile and web digital solutions technology company.



Register online at  
[business.ucf.edu/financial-literacy-seminar/](https://business.ucf.edu/financial-literacy-seminar/)

