



FAMILY
Foundations

Paving the Way Forward Economic Mobility Summit

May 2-4, 2024





Paving the Way Forward
Economic Mobility Summit

Harmony in the City



OVERVIEW

Harmony in the City: Connecting Individuals and Families with Tools and Resources for Self-Empowerment and Generational Wealth



Welcome to the
Family Foundations

Paving the Way Forward Economic Mobility Summit, where we embark on a journey to empower individuals and families with the tools, resources, and knowledge necessary to achieve self-empowerment, financial stability, and generational wealth. This multi-day summit will convene thought leaders, policymakers, business executives, philanthropists, community advocates, and financial partners from our community to explore innovative solutions, share best practices, showcase local business and community partners, and collaborate on actionable strategies to promote economic mobility and reduce inequality. yourself, your family, and your community

Against the backdrop of Jacksonville's vibrant landscapes, our theme Harmony in the City services as a catalyst for fostering harmony and prosperity within our communities. The Family Foundation of Northeast Florida is dedicated to advancing prosperity and opportunity for all.

TOGETHER, let's build a brighter,
more prosperous future for all.

Paving the Way Forward Economic Mobility Summit 2024

Hosted by
Family Foundations of Northeast Florida



**May
2-4**

Faith-Based Leadership Luncheon

Thursday, May 2, 2024

11:30 a.m. – 3:30 p.m.

Florida Blue Conference Center
4800 Deerwood Campus Parkway
Jacksonville, FL 32246

Partner Gathering

Friday, May 3, 2024

8:30 a.m. – 5:30 p.m.

Florida Blue Conference Center
4800 Deerwood Campus Parkway
Jacksonville, FL 32246

Community Expo

Saturday, May 4, 2024

8:30 a.m. – 5:30 p.m.

Jessie Ball duPont Center
40 E. Adams St.
Jacksonville, FL 32202



Paving the Way Forward
Economic Mobility Summit

Harmony in the City



FAITH-BASED LEADERSHIP LUNCHEON

Thursday, May 2, 2024 | 11:00 AM – 3:30 PM
Florida Blue Conference Center

Harmony in the City: Honoring and Connecting Faith-based Leaders with Tools and Resources for Self-Empowerment and Member Support.

11:00 AM – 11:30 AM

Fellowship & Networking

11:30 AM – 11:35 AM

Welcome Remarks

Nigelle Kohn, Family Foundations of Northeast Fl. Inc.
Pam Peterson, National Foundation for Credit Counseling

11:35 AM – 11:45 AM

Opening Address

Letania Gonzales, Freddie Mac
Rulon Washington, Wells Fargo

11:55 AM – 12:00 PM

Blessing of the Food

Pastor Cedric Jones, Mount Zion Baptist Church of Philadelphia

12:00 PM – 12:15 PM

LUNCH SERVICE

12:15 PM – 1:30 PM

Keynote Address: Inspiring - Transforming - Giving Hope

Aimee Griffin, Association of Black Estate Planning Professionals, Inc.

1:30 PM – 1:45 PM

Fellowship & Networking Break

1:45 PM – 2:40 PM

Faith in Action: Building Bridges, Inspiring Change – A Panel on Community Partnership and Leading by Example

Demika Jackson, Jacksonville Veterans Chamber of Commerce

MODERATOR

PANELISTS

Rulon Washington, Wells Fargo
Dr. Rudy Jamison, City of Jacksonville
Kristopher Smith, LISC Jacksonville
Dr. Aleena Bodoie, Family Foundations of Northeast Fl. Inc.
Letania Gonzales, Freddie Mac
Pastor Cedric Jones, Mount Zion Baptist Church of Philadelphia

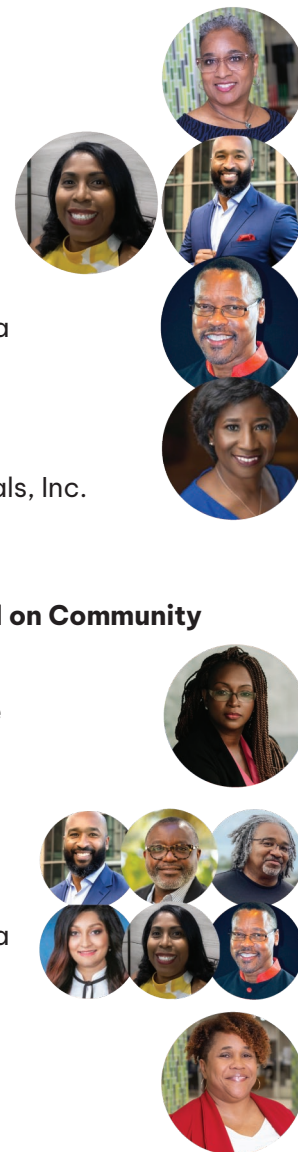
3:00 PM – 3:10 PM

Closing Remarks: Bridging Faith-Based Organizations to Community and Civic Partnerships

Barbara “BJ” Beaman, Family Foundations of Northeast Fl. Inc.

3:10 PM – 3:30 PM

Networking & Resources





PARTNER GATHERING

Friday, May 3, 2024 | 8:30 AM- 5:30 PM
Florida Blue Conference Center

8:30 AM – 9:15 AM

9:15 AM – 9:30 AM

9:30 AM – 9:45 AM

9:45 AM – 10:15 AM

10:15 AM – 11:00 AM

11:00 AM – 11:45 AM

11:45 AM – 12:15 PM

12:15 PM – 12:45 PM

12:45 PM – 1:45 PM

1:45 PM – 2:45 PM

2:45 PM – 3:15 PM

3:15 PM – 4:15 PM

MODERATORS

PANELISTS

4:15PM – 5:15 PM

Harmony in the City: Connecting Community Partners with Tools and Resources for Self-Empowerment and Client Support.

Registration and Breakfast

Welcome Remarks

Nigelle Kohn, Family Foundations of Northeast Fl. Inc.

Introduction

Cearrow “CeCe” Williams, Family Foundations of Northeast Fl. Inc.

A Vision Of Resources, Collaboration, and the Impact It Could Have on the Community

Barbara “BJ” Beaman, Family Foundations of Northeast Fl. Inc.

The Vision of the Movement

LeTania Gonzales, Freddie Mac

Paving The Way Forward 2024 Campaign: A Community Perspective

Hermond Palmer, National Foundation for Credit Counseling

Rulon Washington, Wells Fargo

Pastor Cedric Jones, Mount Zion Baptist Church of Philadelphia

MORNING BREAK, NETWORKING & IDEAS EXCHANGE

BLESSING OF FOOD & LUNCH BREAK

Call to Action

Dr. Melissa Chester, LISC Jacksonville

Keynote Address

Aimee Griffin, Association of Black Estate Planning Professionals, Inc.

AFTERNOON BREAK

Faith in Action: Building Bridges, Inspiring Change – A Panel on Community Partnership and Leading by Example

Cearrow “CeCe” Williams, Family Foundations of Northeast Fl. Inc.

Victor Anderson, Family Foundations of Northeast Fl. Inc.

Nathaniel Herring, State Farm

LaTonya Lipscomb Smith, Esq., Three Rivers Legal Services, Inc.

Hermond Palmer, National Foundation for Credit Counseling

Minister Barry Young, The Bethel Church

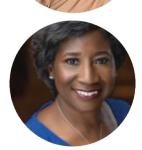
Dr. Mechelle Canady, The Next Chapter 4 Me Consulting,

Rulon Washington, Wells Fargo

Round Table Discussion Activity & Closing Remarks

Barbara “BJ” Beaman, Family Foundations of Northeast Fl. Inc.

Networking & Resources





COMMUNITY EXPO

Saturday, May 4, 2024 | 8:30 AM - 5:30 PM
Jessie DuPont Ball Center

Harmony in the City: Connecting Individuals and Families with Tools and Resources for Self-Empowerment and Generational Wealth.

8:00 AM - 8:30 AM

Doors Open

8:30 AM - 9:15 AM

Registration

Breakfast

Location: Lecture Hall (Second Floor)

9:00 AM - 9:00 AM

Welcome and Opening Remarks

Barbara "BJ" Beaman, Family Foundations of Northeast FL, Inc.

BREAKOUT 1 / 9:15 AM - 10:15 AM

All Breakout Sessions are located on the 2nd Floor



ROOM 38

Prepurchase Ready 2024

Speaker: Tamonica Mike, Ameris Bank

Aspiring individuals with essential knowledge of the home buying process, from understanding mortgage options, and budgeting to navigating the real estate market. Participants will gain valuable insights and practical tips to confidently pursue their goal of becoming homeowners.



ROOM 39

Wealth-Building Estate Kit Planning

Speaker: LaTonya Lipscomb Smith, Esq., Three Rivers Legal Services, Inc.

Participants will delve into the critical aspect of estate planning, helping participants create a comprehensive strategy to protect their assets and ensure a smooth transfer of wealth to heirs. Topics covered include wills, trusts healthcare directives, and minimizing tax implications, enabling attendees to make informed decisions to secure their family's financial future.



ROOM 43

Credit and Loan Essentials: Mastering Scores, Ratios, and Borrowing

Speakers: Jonathan Leysath & Shalice Harris, Self-Help Credit Union

Participants will learn the ins and outs of securing credit and loans. Topics covered include understanding credit scores, debt to income ratios, and what makes a great loan customer.





■■■ ROOM 44

Debt Management

Speaker: Billie Passmore, InCharge Debt Solutions

Participants will gain a comprehensive understanding of the benefits of debt management, using debt wisely, and the difference between debt management programs versus consolidation or solution programs.

BREAKOUT 2 / 10:30 AM – 11:30 AM

All Breakout Sessions are located on the 2nd Floor



■■■ ROOM 38

Create Personal Wealth Plans

Speaker: Caleena Shirley, North Florida at Black Business Investment Fund

Participants will gain the ability to build and improve their credit for a brighter financial future. Participants will learn how to manage their credit responsibility, raise their credit scores, and leverage credit for personal growth, whether that's securing better loan rates, obtaining housing, or pursuing their dreams with confidence.



■■■ ROOM 39

Physical, Emotional & Mental, Wellbeing | Self-Care What Does That Really Look Like

Speaker: Stephanie Mitchell-Jackson, Family Foundations of Northeast Florida, Inc.

Participants will have an opportunity to prioritize themselves over others. It explores strategies for self-care, stress management, and maintaining physical and emotional health, empowering the participant to continue their caregiving, or serving roles while preserving their vitality and balance.



■■■ ROOM 43

Empowering Futures

Speaker: Cearrow "CeCe" Williams, Family Foundations of Northeast Florida, Inc.

Empowering futures through workforce development focuses on equipping individuals with the skills, knowledge, and resources needed to achieve economic self-sufficiency. It covers topics such as career planning, financial literacy, digital skills, and soft skills development. The essence of the workshop is to empower participants to create a pathway towards a successful and sustainable future by enhancing their employability and financial well-being.



■■■ ROOM 44

Creating a Money Savvy Generation

Speaker: Twyla Prindle, Inc., Kash Kids

Join us for an exciting session on Creating a Money Savvy Generation! Our goal is to empower the next generation with the knowledge and skills they need to make smart financial decisions. We believe that by teaching children and young adults about money management, we can help them build a strong foundation for their future.



COMMUNITY EXPO LUNCHEON

11:00 AM – 1:00 PM

Keynote Address: Inspire-Wills and Estate Planning: A Community Perspective
Location: Lecture Hall (Second Floor)

Keynote Speaker:
Hermond Palmer, National Foundation for Credit Counseling



Self-Help Credit Union Presentation
Jonathan Leysath, Self-Help Credit Union



BREAKOUT 3 / 1:15 AM – 2:15 PM

All Breakout Sessions are located on the 2nd Floor



ROOM 38 **Prepurchase Ready 2024**

Speakers: Brittany Hillman & Corey Calvin, Bank of America
Aspiring individuals with essential knowledge of the home buying process, from understanding mortgage options, and budgeting to navigating the real estate market. Participants will gain valuable insights and practical tips to confidently pursue their goal of becoming homeowners.



ROOM 39 **Wealth-Building Estate Kit Planning**

Speaker: LaTonya Lipscomb Smith, Esq., Three Rivers Legal Services, Inc.
Participants will delve into the critical aspect of estate planning, helping participants create a comprehensive strategy to protect their assets and ensure a smooth transfer of wealth to heirs. Topics covered include wills, trusts healthcare directives, and minimizing tax implications, enabling attendees to make informed decisions to secure their family's financial future.



ROOM 43 **Credit and Loan Essentials: Mastering Scores, Ratios, and Borrowing**

Speakers: Jonathan Leysath & Shalice Harris, Self-Help Credit Union
Participants will learn the ins and outs of securing credit and loans. Topics covered include understanding credit scores, debt to income ratios, and what makes a great loan customer.



ROOM 44 **Debt Management**

Speaker: Billie Passmore, InCharge Debt Solutions
Participants will gain a comprehensive understanding of the benefits of debt management, using debt wisely, and the difference between debt management programs versus consolidation or solution programs.



BREAKOUT 4 / 2:30 PM – 3:30 PM

All Breakout Sessions are located on the 2nd Floor

ROOM 38

Create Personal Wealth Plans

Speaker: Caleena Shirley, North Florida at Black Business Investment Fund

Participants will gain the ability to build and improve their credit for a brighter financial future. Participants will learn how to manage their credit responsibility, raise their credit scores, and leverage credit for personal growth, whether that's securing better loan rates, obtaining housing, or pursuing their dreams with confidence.



ROOM 39

Physical, Emotional & Mental, Wellbeing | Self-Care What Does That Really Look Like

Speaker: Brittany McIntyre, Family Foundations of Northeast Fl. Inc.

Participants will have an opportunity to prioritize themselves over others. It explores strategies for self-care, stress management, and maintaining physical and emotional health, empowering the participant to continue their caregiving, or serving roles while preserving their vitality and balance.



ROOM 43

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ROOM 44

Creating a Money Savvy Generation

Speaker: Twyla Prindle, Kash Kids, Inc.

Join us for an exciting session on Creating a Money Savvy Generation! Our goal is to empower the next generation with the knowledge and skills they need to make smart financial decisions. We believe that by teaching children and young adults about money management, we can help them build a strong foundation for their future.



3:30-5:30

Closing Remarks and Networking

Barbara "BJ" Beaman, Family Foundations of Northeast Fl. Inc.



SUMMIT SPEAKER LINE-UP



KEYNOTE SPEAKERS



AIMEE GRIFFIN
Founder and President
Association of Black Estate Planning Professionals



HERMOND PALMER
Vice President of Outreach and Inclusion
National Foundation for Credit Counseling



RULON WASHINGTON
Executive Director of Mortgage Sustainability and Business Execution
Wells Fargo Home Lending Diverse Segments



SPEAKERS



BARBARA "BJ" BEAMAN
F.R.E.E. Program Manager
Family Foundations of Northeast Florida, Inc.



DR. ALEENA BODOE
Clinical Counselor
Family Foundations of Northeast Florida, Inc.



DR. MECHELLE CANADY
Founder
The Next Chapter 4 Me Consulting, Planning and More



DR. MELISSA NOLAND CHESTER
Economic Program Development Officer
LISC Jacksonville



COREY COLVIN
Vice President Lending Market Leader
Bank of America



LETANIA GONZALES
Housing Outreach Manager
Freddie Mac



SPEAKERS



SHALICE HARRIS
Member Service Supervisor
Self-Help Credit Union



NATHANIEL HERRING
Project Manager
State Farm Heirs' Property



BRITTANY HILLMAN
Vice President, Business Development Manager
Bank of America



STEPHANIE MITCHELL JACKSON
Clinical Counselor
Family Foundations of Northeast Florida, Inc.



DR. RUDY JAMISON
Jacksonville Human Rights Commission Executive Director
City of Jacksonville



REV. CEDRIC H. JONES
Senior Pastor
Mount Zion Baptist Church of Philadelphia



NIGELLE KOHN
Finance & Administration Manager
Family Foundations of Northeast Florida, Inc.



JONATHAN LEYSATH
Business Development Branch Manager
Self-Help Credit Union



BRITTANY MCINTYRE
Clinical Counselor
Family Foundations of Northeast Florida, Inc.



TAMONICA MIKE
CRA Mortgage Banker
Ameris Bank





SPEAKERS



BILLIE PASSMORE
Program Director
InCharge Debt Solutions



TWYLA PRINDLE
Founder
Kash Kids, Inc.



CALEENA SHIRLEY
Regional Director - North Florida
Black Business Investment Fund



KRISTOPHER SMITH
Community Program Development Officer
LISC Jacksonville



LATONYA LIPSCOMB SMITH, ESQ.
Heirs' Property Project Manager
Three Rivers Legal Services, Inc.



PASTOR BARRY YOUNG
Pastoral Leader
The Bethel Church



MODERATORS



VICTOR ANDERSON
Registered Mental Health Counseling Intern
Family Foundations of Northeast Florida, Inc.



DEMIKA JACKSON
Founder and President
Jacksonville Veterans Chamber of Commerce



CEARROW "CeCe" WILLIAMS
Life Coach and Facilitator
Family Foundations of Northeast Florida, Inc.



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FAMILY

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FAMILY FOUNDATIONS

Everyone – every household, every business, every family –
needs to be wise about money.

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familyfoundations.org

