



CFA Society
Boston

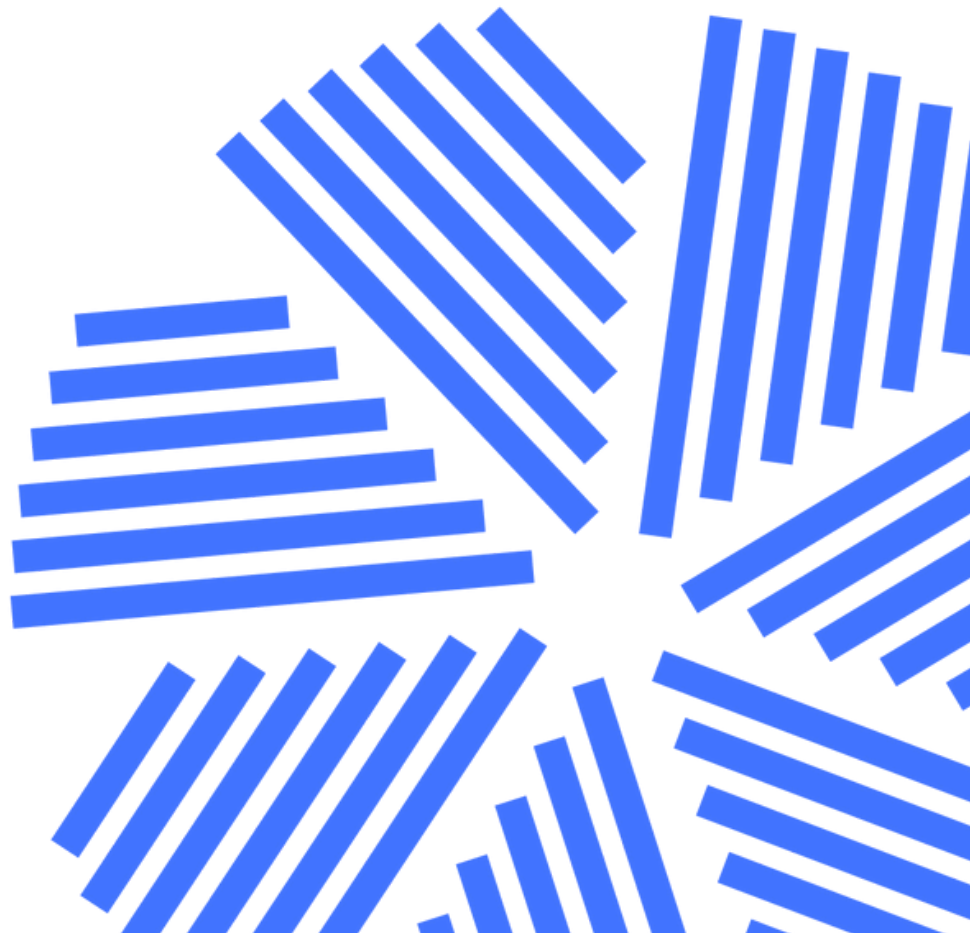
80
Years

Financial Literacy Leadership Summit

April 14th, 2026 | 11:00AM-6:00PM

100 High Street, 9th Fl, Boston, MA 02110

For event inquiries,
please email events@cfaboston.org



Financial Literacy Leadership Summit

Strategy, Stewardship and Outcomes

CFA Society Boston is proud to host the first ever Financial Literacy Leadership Summit on April 14, 2026. This gathering brings educators, nonprofits, volunteers, and sponsors together to mark Financial Literacy Month and to learn from one another. Through shared ideas, real world examples, and practical tools, the Summit aims to strengthen financial education and investor protection across our region.

We open with a keynote on the state of financial capability across Greater Boston, featuring Treasurer Deborah Goldberg, Massachusetts State Treasurer and Receiver General. We then move into three focused panels that translate insight into action.

Together we will explore how organizations can more effectively reach priority communities through practical outreach and intake strategies, test program formats and activities that deepen engagement and long term participation, and share approaches to protecting older adults from fraud while strengthening their financial wellbeing.

CFA Society Boston is New England's largest membership organization for investment professionals with over 6,000 members. Through our Financial Literacy initiative, the Society connects volunteers with schools, community organizations, and employees to expand access to unbiased financial education.

Financial Literacy Leadership Summit

Strategy, Stewardship and Outcomes

Panel 1: Reaching Priority Communities

According to the 2024 National Financial Capability Study from the FINRA Investor Education Foundation, nearly two thirds of adults say higher food costs have forced them to cut back on other spending in the past five years, putting particular pressure on priority communities. This panel explores how to reach those communities with programs that feel relevant and achievable, highlighting intake questions that predict strong turnout and retention, low lift tactics for reminders and host logistics, and practical ways to adapt content for language and accessibility needs.

Panel 2: Trends that Change How We Teach

According to the 2024 National Financial Capability Study from the FINRA Investor Education Foundation, 81 percent of adults now use a mobile device to manage checking or savings accounts, making digital banking the place where financial habits are formed every day. This panel highlights practical program formats and tools that deepen engagement, build trust, and keep participants coming back, with a focus on interactive formats that raise retention in short programs, keeping materials current without heavy production work, and scenario practice that travels easily across audiences.

Panel 3: Fraud, Scams, and Senior Financial Security

With 12.5 billion dollars in fraud losses reported to the FTC in 2024 and older adults bearing the highest median losses, fraud is a growing threat to senior financial security. This session focuses on what providers are seeing on the ground, how to respond early, and how to promote lasting financial wellbeing for older adults.

Our Keynote Speaker

Treasurer Deborah Goldberg, Massachusetts State Treasurer and Receiver General



Deborah B. Goldberg is the Massachusetts State Treasurer and Receiver General. In that role she is responsible for the state's cash and debt management, unclaimed property, and chairs state boards and commissions, including the Massachusetts School Building Authority, the Pension Reserves Investment Management Board, the State Board of Retirement, Massachusetts State Lottery Commission, and the Massachusetts Clean Water Trust. In 2015, she established the Office of Economic Empowerment, the first of its kind in the country, and chairs its Economic Empowerment Trust Fund. Treasurer Goldberg is the former President of the National Association of State

Treasurers and is the Chair of the National Institute of Public Finance. As a former businesswoman and local elected leader, Treasurer Goldberg brings innovative leadership, disciplined fiscal management and an unwavering commitment to uphold economic stability and create opportunity for every Massachusetts resident. Treasurer Goldberg served for six years on the Brookline Board of Selectmen, including two as its Chair. Prior to her career in public service, she worked in retail operations, buying, and consumer affairs at The Stop & Shop Companies, Inc.

An active and engaged volunteer, Treasurer Goldberg is the President Emeritus of Adoptions with Love, a member of the Greater Boston Food Bank Advisory Board, a founder of Berkshire Hills Music Academy - a school for individuals with intellectual disabilities - a trustee emeritus at Beth Israel Lahey Health, and a former Director at Affiliated Physicians Group / Beth Israel Deaconess HealthCare. Her philanthropic work includes associations with The Miriam Fund, the 100 Club, United Way, and the Combined Jewish Philanthropies.

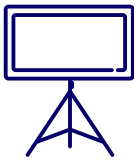
A graduate of Boston University, Boston College Law School and Harvard Business School, Treasurer Goldberg lives in Brookline with her husband Michael Winter. She has a son, Evan, and daughter, Meredith.

Community Sponsorship

\$1K Investment

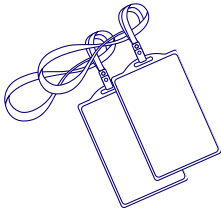
Position your organization as a committed steward of financial well-being by supporting Greater Boston's flagship financial literacy summit. The Community Sponsor level provides organizations with a meaningful platform to demonstrate their commitment to financial capability while gaining visibility among educators, nonprofits, volunteers, and community leaders.

Sponsorship Benefits



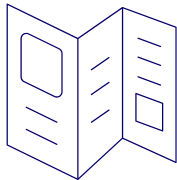
Organization Visibility

Your logo featured on shared onsite signage and walk-in slides, as well as on our event mini site.



Complimentary Registrations

Invite two associates from your organization to attend the Leadership Summit and connect directly with our community of practitioners and leaders.



Post-Event Materials

Provide an organizational resource that will be included in the post-event attendee thank you emails.



Attendee Insights List

Access a detailed attendee list with contact information to facilitate personalized follow-up and strengthen connections beyond the event.



Questions about sponsorship opportunities?
Email sponsorships@cfaboston.org

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