



2017 Year In Review

The Center for Financial Security is an applied, multidisciplinary research center located at the University of Wisconsin-Madison that seeks to inform practitioners, policymakers, and the general public on strategies for building financial capability and security over all stages of life.

Center for
Financial Security 
UNIVERSITY OF WISCONSIN-MADISON

Dear Friends and Affiliates,

Another productive and dynamic year has passed at the Center for Financial Security. 2017 was a year characterized by growth and commitment to the Wisconsin Idea as CFS strived to broadly disseminate our research and develop practical application for Wisconsin and the world beyond. CFS faculty and staff served throughout Wisconsin, visited at least fifteen U.S. states, and traveled internationally to deliver more than fifty presentations and workshops sharing the research and resources developed by CFS. Faculty Director of the Center, J. Michael Collins, was recognized for his tremendous commitment, achievements, and contributions to the field of financial capability as a recipient of the inaugural Ketchum Prize awarded by the FINRA Investor Education Foundation.

In 2017 CFS welcomed ten new Affiliate and Fellow Researchers to our network and held an innovative Financial Technology event in the School of Human Ecology as well as a Financial Coaching Symposium with the Consumer Financial Protection Bureau (CFPB). CFS was thrilled to launch the Household Finance Research Seminar Series in 2016 and kick off the second year in the fall of 2017. The seminar series allows researchers from across departments, campus, and the nation to come together on a weekly basis to promote constructive feedback on early stage household finance research and foster ideas for new work.

CFS is pleased to share our 2017 Year in Review visual guide of notable endeavors, outreach and engagement, accomplishments, and upcoming events for 2018, but we are even happier to take the opportunity to thank you for your support. Our partners, affiliates, policy and practice network, and community members not only make our work possible, but make our efforts richer, our resources more relevant, and our research more rigorous.

CFS appreciates gifts to support the vital research of the Center for Financial Security. Please click on the gift icon to give through the University of Wisconsin Foundation:

From all of us at the Center for Financial Security, we look forward to working with you in the coming year and wish you and yours a happy and healthy 2018!



Who We Are

CFS thrives due to the diverse expertise and knowledge of our core team of faculty and staff (pictured from top clockwise):

- **Peggy Olive**, Financial Capability Specialist
- **Justin Sydnor**, Associate Director
- **Hallie Lienhardt**, Outreach Specialist
- **Collin O'Rourke**, Research Specialist
- **Leah Gjertson**, Research Specialist
- **Sara Nowakowski**, Research Specialist
- **Mary Beth Collins**, Director of Centers Research and Public Affairs
- **Andrea Plassman**, Research Administrator
- **J. Michael Collins**, Faculty Director

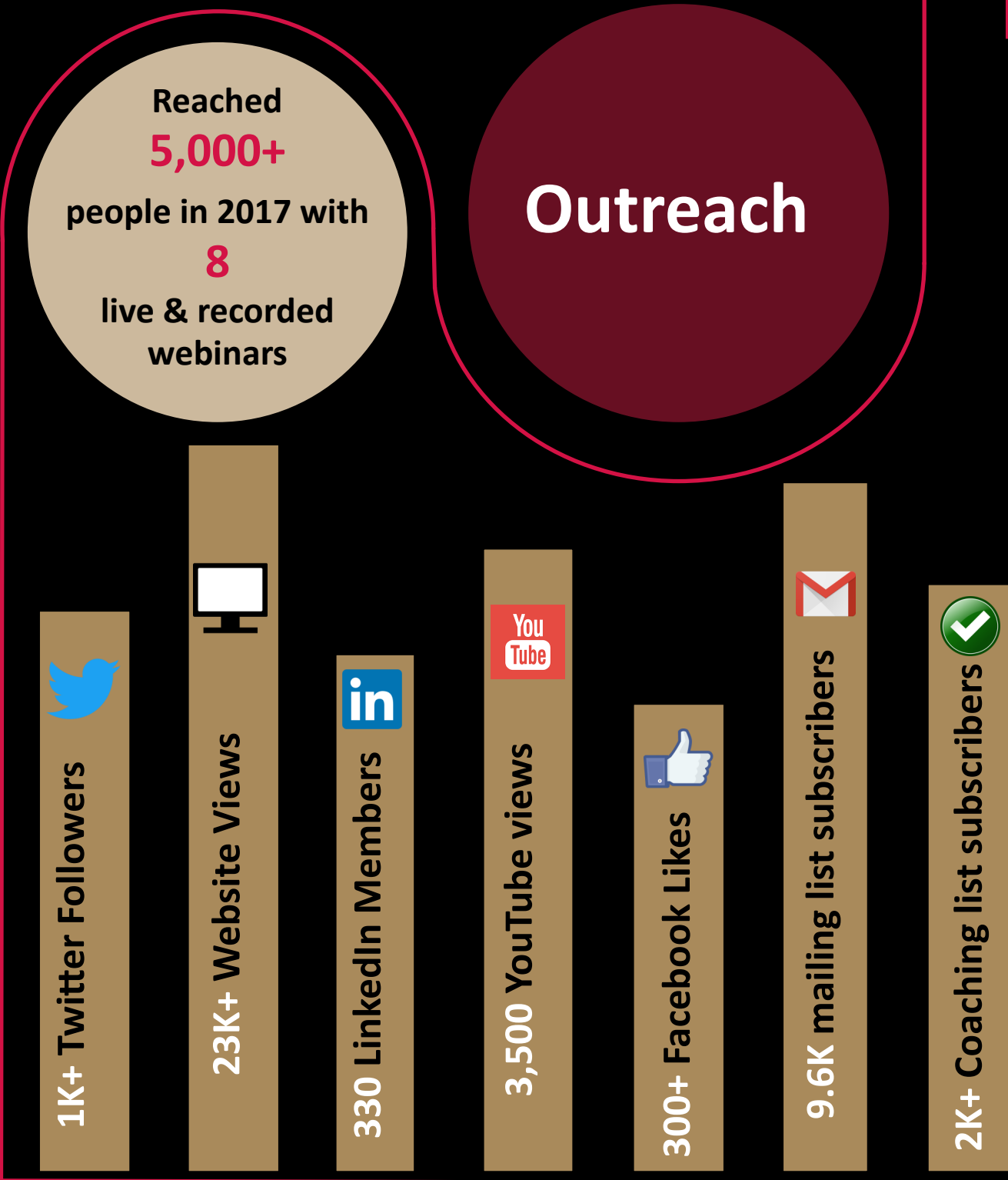
77
Affiliates &
Fellows Representing
30
Organizations

6
Undergraduate
Interns &
6
Project Assistants
In 2017

Over
100
Graduate &
Undergraduate
Students Supported
since 2009

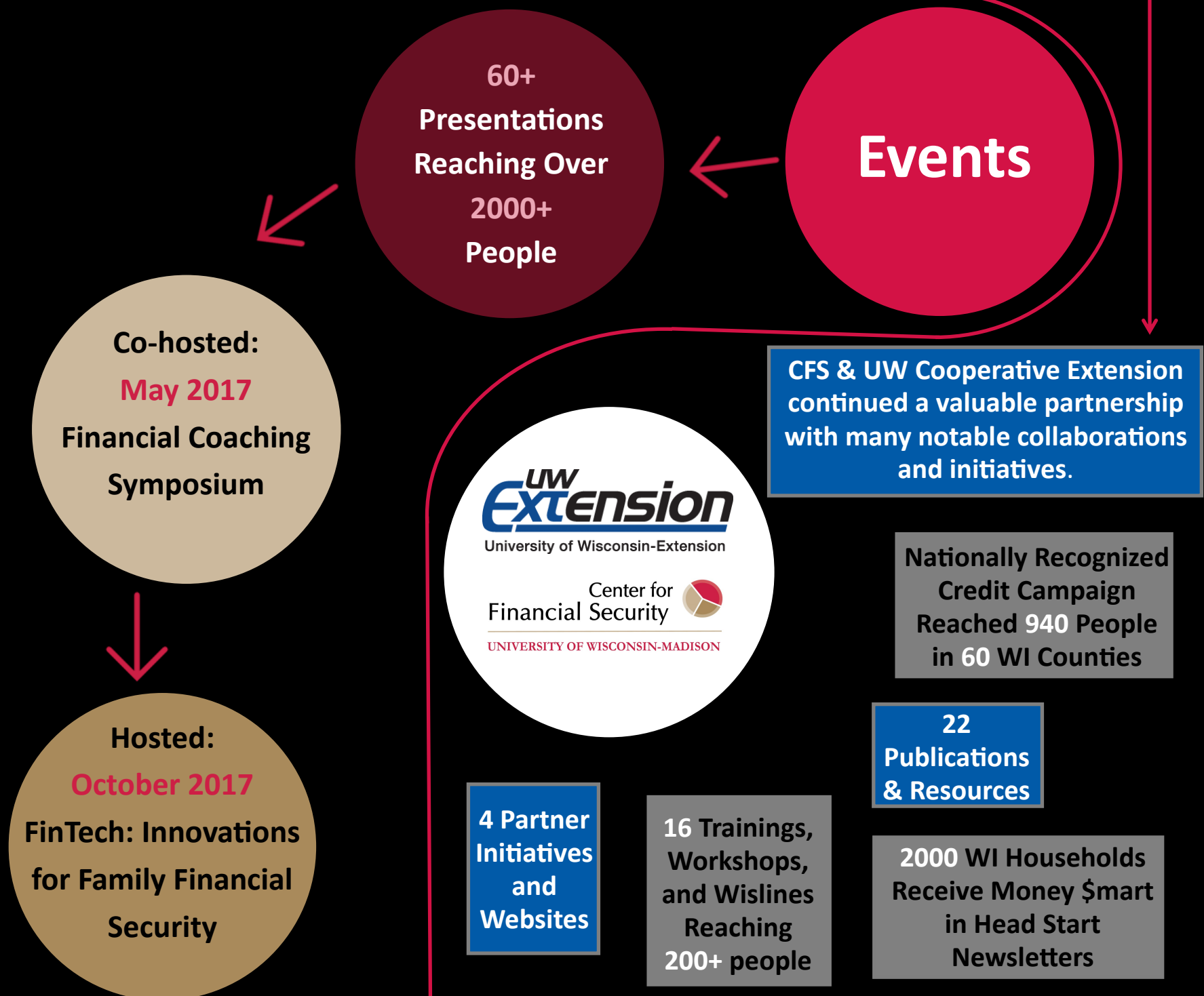
Over
\$1 Million
in Student Support
Since 2009

What We Do



Outreach Partners & Initiatives

- Annie E. Casey Foundation: Financial Coaching
- School of Human Ecology: FinTech Event & Household Finance Seminar Series
- Asset Funders Network: Financial Coaching Outreach
- CFPB: Financial Coaching Symposium
- WI Department of Financial Institutions: Statewide Financial Education Work
- University of Wisconsin-Extension: Statewide Financial Capability Initiatives





Research

\$470k

In Research and Consulting

21

Household Finance Seminar Speakers

15

Briefs & Reports, Journal Articles, & Publications

Research Partners & Projects

- **National League of Cities: LIFT-UP Phase II**
- **MetLife Foundation & National League of Cities: City Scan of Local Financial Inclusion Efforts**
- **MetLife Foundation: Financial Coaching & Health Outcomes**
- **Abt Associates & CFPB: Financial Well-Being**
- **US Treasury, Vanguard, & School District of Palm Beach County: My Classroom Economy**
- **School District of Palm Beach County: Youth Financial Literacy Reading Guide**
- **CFPB: Money as you Grow**
- **Center for Retirement Research at Boston College & Wisconsin Department of Employee Trust Funds: Can Knowledge Empower?**
- **Great Lakes Higher Education: Adult Fiscal Competency**
- **UW Foundation: Small Savings Big Dreams**
- **Clarifi: Financial Coaching & Health Pilot**
- **GreenPath Financial Wellness: Financial Coaching & Health Pilot**

Upcoming Events: Winter-Spring-Summer 2018

Feb	March	April	May	June/July	Aug/Sept
<ul style="list-style-type: none"> • HHF Seminar: (2.1) • HHF Seminar: Fenaba Addo (2.8) • HHF Seminar: Justin Sydnor (2.15) • HHF Seminar: Jordan van Rijn (2.22) • Webinar: FICO Scores & Financial Behavior 	<ul style="list-style-type: none"> • HHF Seminar: Mary Hamman (3.1) • HHF Seminar: Corina Mommaerts (3.8) • HHF Seminar: Lydia Ashton (3.15) • Webinar: Roles of Mortgages in Retirement • Financial Coaching Training: Milwaukee, WI, March 21-22 	<ul style="list-style-type: none"> • HHF Seminar: Andra Ghent (4.5) • HHF Seminar: (4.19) • HHF Seminar: (4.26) • Webinar: Banks in Schools & Effects on Youth 	<ul style="list-style-type: none"> • HHF Seminar: (5.3) • Webinar: Employer-Based Financial Coaching Models • Financial Coaching Training: Wausau, WI 	<ul style="list-style-type: none"> • Webinar: FINMed: Financial Interventions Nested into Medical Practices 	<ul style="list-style-type: none"> • HHF Seminar Resumes • Financial Coaching Training: Madison, WI • Webinar: Technology Use in Financial Coaching • CFS Affiliates Meeting

Stay in touch with CFS in 2018! Sign up for our mailing list to receive updates and invitations [HERE](#).