



WINTER 2024

The CEE Report

Upcoming Events

Survey of the States Launch

February 26, 2024

Visa Offices
277 Park Avenue, 48th Floor,
New York, NY

2024 Diamond Gala

April 30, 2024

The Pierre Hotel, New York, NY

Diamond Award

Glenn Hutchins

Chairman of North Island and
North Island Ventures
Co-Founder of Silver Lake

Distinguished Economist

Gary H. Stern

Former President and CEO
Federal Reserve Bank of Minneapolis

National Personal Finance Challenge Finals

May 19 – 20, 2024

Federal Reserve Bank of Cleveland
Cleveland, OH

National Economics Challenge Finals

June 1 – 3, 2024

New York, NY

Contact Us

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For more information about
events, please contact

Tarnisha Smart

at 212.827.3620 or

tsmart@councilforeconed.org

“Educating children about the fundamentals of economics and personal finance is a critical building block for a successful life as an adult. Teaching basics about the value of a job and savings from earnings, as well as the workings of loans and other financial obligations prepares the successor generation for productive lives, strengthening our economy. This is what the CEE encourages. It is a patriotic endeavor worth supporting enthusiastically.”

Richard W. Fisher

Senior Advisor to Barclays and Former President, Federal Reserve Bank of Dallas
2023 Visionary Award Honoree



Bringing Thought Leadership to Our Communities

In addition to the daily work we do with educators and students of economics and personal finance, CEE also brings ideas, insights and inspiration to leaders in our various communities. See what we shared this Fall alone.

Providing Insights

Attendees to CEE’s Before the Bell Breakfast were fortunate to see **Saira Malik**, Chief Investment Officer of Nuveen converse with **Jenny Van Leeuwen Harrington**, CEE Board member and CEO of Gilman Asset Management. They talked about Saira’s unusual path to Wall Street, how we can make the industry more inclusive, what the outlook is for 2024, and advice for young people getting started in financial services.



Continued on page 3



In the States



Note from Nan

In 2023, CEE moved the needle on our mission.

Our priority programs grew and met with much success. The National Personal Finance Challenge grew and raised the number of students of color participating to 38%. The Invest in Girls program grew overall and paired over 100 teen girls with mentors. Not only did 12 more states pass requirements to take a personal finance class to graduate this year, but CEE had a strong hand in that legislation passing in Pennsylvania. We continue to support educators with highly rated professional development and new resources – including our updated AP economics resources and new lesson series on business, ethics, and economics. Our work has been noted in the media, including on CNBC, the NYTimes, The Washington Post and Education Week.

Several of our long-standing corporate funders recently noted the quality of our work and our thought leadership as reasons for their support. And of course, hearing our students talk about how our programs have helped them to steer their course – understand money, make choices about courses of study, and careers – brings it home to our team.

2024 brings excitement as we celebrate our 75th anniversary. Our mission is enduring - there is always a next generation of students to support in building lives of stability and mobility using the tools and knowledge they gain from CEE.

While we face a world with many challenges, I hope that you will continue to support our foundational work for children.

Nan J. Morrison

Nan J. Morrison
President and CEO



In Fall 2023, CEE's affiliate at Northern Arizona University, worked with its local community partner, Center for American Indian Economic Development, and Invest in Girls to hold financial literacy workshops for 22 students from Navajo and Hopi tribes. The program provided Chromebooks to the young women making it possible for them to participate in the program. Participating students built financial knowledge, networked with finance professionals, and participated in a capstone conference. Participating students said of the program: "My experience was great, because it taught me things that I would have probably struggled with in the future." And "My CFO experience was very helpful and enriching because it taught financial stuff that's not really talked about in school."

Continued from page 1

Bringing Ideas ▶▶

This year's IIG Champions of Financial Literacy Breakfast featured **Valerie Mosley**, Founder and Chief Visionary Officer of BrightUp who was interviewed by **Rebecca Patterson**, CEE Board Chair and Former Chief Investment Strategist at Bridgewater Associates. These two extraordinary women shared the significance of the concept of financial well-being and the pivotal role women can play in shaping the future of finance.



◀◀ Inspiring Educators

The 2024 Financial Literacy and Economic Education Conference brought former NFL player and personal finance advocate, **Brandon Copeland**, to be the keynote speaker. He made it personal, sharing financial mistakes that he made when he was young and first joined the NFL. During Q&A, he turned it around and asked teachers to share their biggest personal financial mistake and how they learned from it. Some were eager to share their stories, and many found the session motivating and memorable.

Supporter Spotlight

Robinhood generously supports CEE and its affiliates in Florida, Alabama, Delaware, Nebraska, and Montana to reach students and teachers nationwide. With their generosity, CEE helps provide all educators with the resources and training needed to confidently teach the highest quality personal finance and economics courses. This is especially essential for educators who may be teaching these courses for the first time when their state begins to require personal finance or economics coursework for high school graduation. This February for example, with Robinhood's support, we will host the first in a series of Connecticut educator trainings, a state that recently passed personal finance high school graduation requirements. We join in Robinhood's mission to "democratize finance for all" and look forward to continued partnership as we expand access for every student to this essential knowledge and skills.

Robinhood 

NOTE FROM BOARD CHAIR



CEE is always looking forward to how we can improve lives of individuals and support the broader economy through economics and personal finance education. This year, however, we are also looking back.

Specifically, our 75th anniversary in 2024 warrants reflection. When we were founded in 1949, the world was adjusting to a post-war economy. Overseas, the Marshall Plan was rebuilding countries in need. At home, a resumption of domestic consumption and a shortage of homes boosted inflation, while the increased peacetime US labor supply couldn't meet demand, pushing the unemployment rate up towards 7%.

This quickly changing world required new skills. Economists and policymakers, seeing that need, created what is now CEE to ensure students would have access to the fundamental knowledge they'd need to thrive.

Much has changed since then, both in terms of the global economy and financial markets. What hasn't is the necessity of ensuring young people can successfully navigate whatever comes next. CEE is more important than ever, for young people, their communities, and our broader economy.

Rebecca Patterson, *Chair*
Chief Investment Strategist (former)
Bridgewater Associates

ADVOCACY

SURVEY of the STATES

Save the Date for the 2024 Launch of Survey of the States

Last December, Pennsylvania Governor Shapiro signed into law Senate Bill 647, which requires all Pennsylvania high school students take one semester of personal finance to graduate from high school. This bill was supported from its infancy by CEE and FinEd50, the advocacy coalition we founded with support from **Visa**. This law adds Pennsylvania to the list of nine states who passed new laws instituting similar requirements in 2023 alone and was a top priority for FinEd50.



On February 26, CEE will hold an event to launch the 2024 *Survey of the States*, detailing the status of personal finance and economic education in all 50 states and DC. The survey report will celebrate how far we have come and lays out priorities for the future. Thanks to the generous support of Visa, we will hold this exciting event in New York to share and discuss the findings and draw attention to the report and this important topic.

CEE is turning 75!

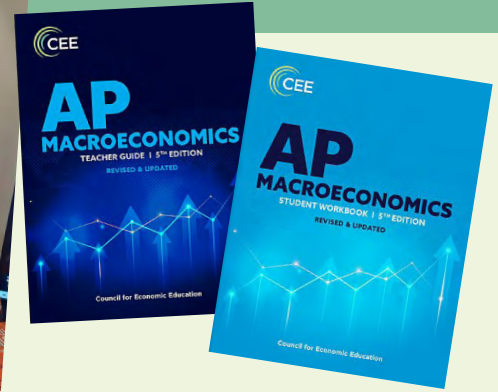


We are excited to reaffirm our mission and use our anniversary to both look back and move forward! We hope you will come to one of our events and follow us on LinkedIn to see anniversary content throughout the year.

REFRESHED CONTENT!

We did significant work in 2023 to ensure our teaching materials are relevant and reflect recent advances in knowledge.

- Authored and launched the 5th edition of [AP Economics Micro](#) and [Macro Economics Teacher Guides](#) and Student Workbooks in e-book and print.
- Updated and added 100 relevant resources to EconEdLink, including the new [Ethics, Economics, and Social Issues collection](#).



GRADES 9-12

NEW! Can You Be Fashionable and Ethical?



GRADES 9-12

NEW! What Can We Do About Pollution?



GRADES 9-12

NEW! What is the Most Ethical Way to Fund Public Schools?

DELIVERED BEST-IN-CLASS PROFESSIONAL DEVELOPMENT!

- Delivered professional development to educators, providing 9,000 continuing education certificates and 15,000 hours of training with 92% of participants stating they would recommend their course to a colleague.
- Inspired 400 educators at our annual Financial Literacy and Economic Education Conference (pictured top left).

[Take a look and hear from the teachers!](#)

- Our Master Teacher network has expanded to over 50 education experts who can develop new lessons and deliver engaging and rigorous professional development.

Bottom left, CEE staff at NYC DOE Teacher Professional Development Day.



GREW STUDENT ENGAGEMENT!

- Grew the National Personal Finance Challenge 21% to over 15,000 student competitors
- Introduced over 2,100 teen girls to personal finance and to potential careers in financial services — growing our Invest in Girls program by 50% in only one year.
- The IIG mentorship program tripled in size and now has over 100 pairs of financial professional and teen girls meeting twice monthly throughout the school year.



EXPANDED ACCESS TO OUR PROGRAMMING!

- We continue to make significant progress in ensuring equitable access. Black and Hispanic student participation in the National Personal Finance Challenge has risen from 21% to 37% over last 2 years. For the first time, we also achieved gender parity in NPFC participation.
- CEE is leveraging a growing network of experienced educators—we call them Educational Delivery Specialists—to extend the reach of our programs to new communities.

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We sincerely appreciate all the people, businesses, and institutions who supported us in 2023. These generous donors make our essential work possible.

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