

# Creating Better Financial Futures

April Regional Meeting  
Connecticut Asset Building Collaborative

**April 6, 2017 9am to 12pm**

Gateway Community College, 20 Church Street, New Haven

**Free parking at the [Temple Garage](#) bring parking ticket to security**

## **Continental breakfast and networking**

- Annie Harper, [Connecticut Mental Health Center](#) – Mistress of Ceremonies

## **Welcome**

- Andrew Geisert, [LifeBridgeCT](#)
- Victoria Bozzuto, Dean, Workforce Development and Continuing Education, [Gateway Community College](#)
- Joyce Armstrong, [CT Dept of Rehabilitation Services](#) and Cassandra DeFelice, [Community Action Agency of New Haven](#)

## **Speed Networking**

- Get to know your colleagues
- Learn about opportunities for collaboration and partnership

## **Break**

## **Education and Training Opportunities to Create Brighter Financial Futures**

- Erika Lynch, Workforce Development and Continuing Education, [Gateway Community College](#)
- Erik Clemons, CEO and President, [Connecticut Center for Arts and Technology \(ConnCAT\)](#)

## **Partnerships with Banks and Credit Unions to Improve Financial Stability of Low/Moderate Income Consumers**

- Louise Nestor, Director of Marketing, [Connex Credit Union](#)
- Rosa Carrero, [Liberty Bank](#)
- Amy Casavina Hall, Chief Impact Officer, [United Way of Greater New Haven](#)

## **City of New Haven Financial Empowerment Initiative**

- Frederick W. Kaiser II, Deputy Director, [Community Services Administration, City of New Haven](#)
- KC McAuliffe, Coordinator Adult Literacy and [New Haven Financial Empowerment Center](#), New Haven City Hall
- Annie Harper, [Connecticut Mental Health Center](#)

Q & A and Wrap Up with speakers



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## Presenter Biographies

### **Erika Lynch, Workforce Development and Continuing Education, [Gateway Community College](#)**

Erika Lynch started working for Gateway Community College in 2006 as the Health Careers Advisor. This position was the result of collaboration between the local Workforce Investment Board (Workforce Alliance) and Gateway Community College. She provided a comprehensive outreach, testing and advisement services for individuals looking for higher education in a health profession. In 2012 she was hired to be the Workforce Development Coordinator. This position oversees many of the non-credit workforce related training programs and works on new program development with industry and community partners.

### **Erik Clemons, CEO and President, [Connecticut Center for Arts and Technology \(ConnCAT\)](#)**

Erik Clemons is the founding CEO and President of the Connecticut Center for Arts and Technology (ConnCAT), a non-profit organization based dedicated to creating empowering arts based educational environments for at-risk public school students and training programs for under and unemployed adults. April 2017, ConnCAT will be opening the 55-seat Orchid Café; a social enterprise whose revenue will help sustain the newly opened (2016) ConnCAT Culinary Arts Academy. Erik is an Education Fellow at Pahara-Aspen Institute, member of CT State Board of Education, and the Board of Director of the New Haven Housing Authority (Board Chairman), CT Voices for Children, Community Healing Network, Elm City Market, and Promising Scholars, Inc.

### **Louise Nestor, Director of Marketing, [Connex Credit Union](#)**

Louise Nestor is an accomplished marketing veteran boasting more than three decades of experience, including 25 years in the financial services industry. Nestor joined Connex Credit Union in 2013 as its Marketing Director, a role in which she executes integrated strategies designed to increase profitability, and attract and maintain members at the credit union's 7 local branches. During her tenure, Connex membership has grown to more than 48,000 individuals from across New Haven, Hartford, Middlesex and Fairfield Counties. Nestor is passionate about the availability of proper fiscal education and is a prominent advocate for supplying financial literacy materials and courses to young adults.

### **Rosa Carrero, [Liberty Bank](#)**

Rosa Carrero is the community outreach officer and AVP of community development at Liberty Bank. Carrero is a member of the Middlesex United Way Health-Wellness Team and a past chair of the Middlesex United Way Women's Initiative. She has provided leadership to a diverse array of non-profits including: St. Vincent DePaul, the Middlesex County Homeless Prevention Fund, the Middlesex Chapter of the NAACP and the Credit for Life Fair in Middletown, which teaches financial literacy to high school students.

### **Amy Casavina Hall, Chief Impact Officer, [United Way of Greater New Haven](#)**

Amy Casavina Hall is Chief Impact Officer at United Way of Greater New Haven where she leads the organization's efforts to increase opportunities for all residents in the areas of education, health, and financial

stability. Casavina Hall works with public and private partners and United Way stakeholders to identify meaningful opportunities to re-imagine and re-align resources and services to close the education and economic disparities in Greater New Haven. In her ten years at United Way, Casavina Hall has focused the organization on increasing employment, housing, and financial capability opportunities for people with barriers to achieving financial stability.

**Frederick W. Kaiser II, Deputy Director, [Community Services Administration, City of New Haven](#)**

Rick is a graduate of Central CT State University. He has worked in New Haven City since 1983, starting as a case worker with the AIDS population in the City Welfare department. After state assumption of General Assistance from the municipalities in 1997, City Welfare became SAGA Support Services, at which point Rick was running the unit, continuing delivery of social services to 11 towns in the New Haven catchment area. In 1999, he became the Deputy Director of City Department of Children & Family Services overseeing SAGA Support Services and Youth Services, and Teen Pregnancy Prevention. He became involved in asset building as a VITA volunteer in 2000 and as a member of the steering committee member of the New Haven Economic Security Coalition under the Mayor's Family Wealth Initiative. In 2006 DCFS was disbanded and Rick focused on SAGA Support Services and aspects of the Mayor's Family Wealth Initiative. Rick is also active as the Treasurer of the Woodbridge Republican Town Committee, Justice of the Peace and as Vice President of his Church Council.

**KC McAuliffe, Coordinator Adult Literacy and [New Haven Financial Empowerment Center, New Haven City Hall](#)**

Kathleen C McAuliffe (alias KC) is currently serving in as an Americorps Vista Position at City Hall, Community Services Administration, in capacity building and sustainability utilizing the City Transformation Plan with a special emphasis on Financial Empowerment and Literacy in New Haven. Her term is for one year and is completed in Sept. 2017. KC spent 35 years in Healthcare administration and Education. She served four years in the Navy as a corpsman (medic) in Rota Spain, at the end of the Vietnam War. KC has spent the last 30+ years in Maine raising her family, working in Healthcare administration and teaching adult Ed as well as an adjunct faculty in the Maine Community Colleges. Over the past ten years she has had the opportunity to work in the Peace Corps, as a Health Educator in Belize and in Fiji. She returns to Connecticut, after serving the past year as an Americorps Vista (Volunteer in Service to America) in Alaska, with the Elder Mentor Program, traveling throughout the state of Alaska recruiting and training elder mentors to work in the schools and communities with the youth.

**Annie Harper, [Connecticut Mental Health Center](#) / [CT Asset Building Collaborative](#)**

Annie Harper is a cultural anthropologist who works on the connection between finances and poverty, with a specific focus on people with mental illness. She is an Associate Research Scientist in Yale University's Department of Psychiatry, based in the Program for Recovery and Community Health. She has advised the City of New Haven's Financial Empowerment Project, with the goal of providing low-income residents with the support, advice and access to high quality and affordable financial services that they need to be able to manage their finances well and plan for the future.

**Questions? Contact [CTAssetBuilding@gmail.com](mailto:CTAssetBuilding@gmail.com)**