

Peter Tufano:

Overview: Mr. Tufano highlighted D2D's Prize Link Savings program. Filene Research Institute was thrilled to be part of the program when it successfully launched in Michigan last spring (<http://filene.org/home/innovation/i3ideas/buildwealth/15>). Tufano talked about the importance of the implementation phase of any project. He has worked for many years on a tax time savings project with many ups and downs but finally saw traction when President Obama announced as a initiative in his labor day address.

"Robert Manning":

www.rit.edu/, Rochester Institute of Technology

Overview: Mr. Manning discussed WAL-MART's plans to pursue financial institutions in Mexico and the potential effects on credit unions in the U.S. and Canada. Manning also shared with the group his program called Responsible Debt Relief that could be a powerful tool for credit unions.

Jinkook Lee

www.rand.org/ , RAND Corporation

Overview: Ms. Lee's shared her research theories that focus on how individual attitudes change towards savings in their retirement years. Lee's Filene report on this topic comes out in 2010.

Barbara Robles

Overview: Ms. Robles urged credit unions to blow their horns and make sure they are heard by the underserved financial sector, specifically her research focuses on Latinos. Making a connection with the youngest family members will prove to be the key connection to extended families who will be loyal customers with the proper care. Robles Filene report on Latinos and financial institutions comes out this month.

Dorian Stone, McKinsey & Associates

Overview: Mr. Stone discussed the McKinsey/Filene project that is focusing on the "Customer Experience". Together they hosted a series of roundtables that promoted education and discussion. He urged credit unions to find a way to emphasize their local, non-profit qualities that their members/customers value. He emphasized that the large banks he works with wish they could have that local presence that credit unions.

"Robert Hoel":

Overview: Mr. Hoel discussed the development of the Financial Independence Seminar. Its focus is single-day briefing seminars for graduating college seniors who will be taught the foundation of positive personal finance. Clearly, credit union support of the Financial Independence Seminars offers a unique opportunity to connect with America's future earners. Hoel's Filene report on these seminars comes out in November.

See <http://filene.org/home/about/fellows> for a link to each Fellows bio.