

A N N E W E L S H M C N U L T Y INSTITUTE FOR WOMEN'S LEADERSHIP

Let's Talk Money: Taking the Lead on Your Financial Wellness Mentoring Conversation Facilitator's Guide

Thank you for being a mentoring conversation facilitator!

Your role is easy- ensure that the conversation keeps moving and facilitate our goal of a providing space for participants to meet one another, gain mentoring and advise, and expand their networks. We will fully acknowledge that you are not here in the role of formal financial advisors, however—more as mentor who have some knowledge on the subject matter. Below are some helpful guidelines to support your role.

Schedule

Welcome by Dr. Terri Boyer and Introductory comments by Irena Gecas McCarthy

Dinner

Keynote by Mical Jeanlys-White

Let's Talk Money Conversation with Emily Wood, Shannon Kariuki, and Marissa Schrade

Dessert and Coffee with Mentoring Circles/Kitchen Table Conversations – Meredith Okenquist

Table assignments: Participants have been intentionally seated at a table so there is diversity in experience, stage in life, and affiliation with Villanova.

When the mentoring circles begin: If it hasn't already happened, have everyone at the table introduce themselves and briefly explain why they decided to attend tonight.

Conversation starters:

- What are your initial thoughts from the keynote speaker's remarks? How about the Let's Talk Money conversation?
- Based on the remarks:
 - o What do you wish you had known when you were in college about financial wellness?
 - o What are some tips or success stories around financial wellness that you have heard from others?
 - o What are some things with financial wellness to avoid?
 - o Where would you go/have you gone for help on financial wellness? Do you know of any resources around financial wellness?

End with: During the final wrap up have each person share with a partner or with the table **two steps they plan to do** after participating in tonight's discussion. Encourage participants to stay connected with one another (exchange emails, connect through @NovaWomenLead, etc.) as an accountability tool for achieving their next steps. We will close the evening by asking the full group for examples to share.

Tips for facilitators:

- Ensure everyone at the table has someone to talk to. Conversations can exist in small pairs, small groups or around the whole table- just make sure everyone can hear each other
- Point out the QR Code for resources on the table
- **It's ok if conversations go off the given topic of the table-** the main goal is to have participants connecting with each other around the broader topic of financial security and women's leadership