

2021 NATIONAL MEETING TENTATIVE AGENDA



Nov. 2-4, 2021



SFOF National Meeting

Omni Resort Hotel at ChampionsGate



Orlando, FL



SFOF
LOOK TO THE STATES

**Subject to change without notice, all times Eastern Time Zone*

TUESDAY, NOVEMBER 2, 2021

3:30 PM President's Welcome Reception honoring Nebraska Treasurer John Murante and SFOF Board President Seth Metcalf

All events held at the Omni Orlando Resort at Championsgate, 1500 Masters Blvd, Championsgate, FL 33896, unless otherwise noted.

-Ballroom Commons-

All state Leaders and state staff should arrive in time for welcome reception (Reception for Diamond, Platinum, and Gold Sponsors Only)

4:30 PM Welcome Reception Ends

5:15 PM Load group transport for off-site *State Leaders (spouses) and Staff Only*
Welcome Dinner Event - *By Invitation Only*
Sponsored by Public Trust Advisors

WEDNESDAY, NOVEMBER 3, 2021

- 8:30 AM [Prayer Breakfast for the States – National Ballroom AB](#)
(Optional – All Attendees Welcome)
Keynote: Shane Svorec, [Author, Broken Little Believer](#)
- 9:30 AM [SFOF State Staff Communications Workshop \(National Ballroom AB\)](#)
(State Staff Only)
Covering social media, earned media coverage, interview prep
- Dan Morris and Rachel Marie Martin, Audience Industries
 - Brittany Comins, President, Amplify
- 9:30 AM [SFOF State Leaders Meeting & Policy Discussion \(Royal Dublin A\)](#)
(State Treasurers and Auditors Only)
- 12:00 PM [Luncheon – Defending America’s Economic Freedom \(National Ballroom AB\)](#)
Speakers:
- **The Difference Between ESG Investing and ‘Woke’ Capitalism**
 - **Keynote Speaker, Andy Puzder**
Andy Puzder is the Senior Fellow at the Pepperdine University School of Public Policy. He was nominated by President Trump to serve as U.S. labor secretary. His latest book is ["The Capitalist Comeback: The Trump Boom and the Left's Plot to Stop It"](#) (Center Street, April 24, 2018).
- 1:30 PM [**Panel: Defending American’s #Economic Freedom – Part 1**](#)
- Nebraska Treasurer John Murante
 - Will Hild, Executive Director, Consumer’s Research
 - Andrew Olivastro, Director of Coalition Relations, The Heritage Foundation
 - Andy Puzder, Sr Fellow, The Pepperdine University School of Public Policy
- 2:30 PM: NETWORKING BREAK
- 2:45 PM: [**Defending American’s #Economic Freedom – Part 2**](#)
- Missouri Treasurer Scott Fitzpatrick
 - Paul Fitzpatrick, CEO, 1792 Exchange
 - Dan Grant, Co-Founder & CEO, 2ndVote Advisors
 - Jason Stverak, Credit Union National Association
- 3:45 PM [**Panel: Preventing Fraud**](#)
- South Dakota Treasurer Josh Haeder
 - Ashlee Hartman, Executive Director, Kyriba
 - Steve Otwell, Director of Payments, Kyriba
 - Jonathan Williams, Sr. Policy Advisor, SFOF

- 4:45 PM BREAK
- 6:00 PM Awards Banquet Reception
- 6:30 PM SFOF 2021 Awards Banquet – Champions of Economic Freedom
- Derek Kreifels, CEO, State Financial Officers Foundation
 - Nebraska Treasurer John Murante, 2022 SFOF National Chair
 - Seth Metcalf, President, SFOF Board of Directors
 - Rising Star Award
 - Congressional Financial Freedom Award
 - Economic Freedom Award
 - Dr. Tom Coburn Transparency in State Government Award
 - Servant Leadership Award
 - Keynote: Janie Mines, [Author, No Coincidences: Reflections of the First Black Female Graduate of the United States Naval Academy](#), *SVP of Inclusion and Innovation and an Academy Securities' Advisory Board Member*
 - Keynote and Roundtable Discussion: Eugene Scalia, partner at Gibson, Dunn & Crutcher, and former U.S. Secretary of Labor
 - Leadership Roundtable Discussion
- 8:30 PM [After Hours Reception Honoring Award Winners](#)

THURSDAY, NOVEMBER 4, 2021

- 8:00 AM: [Breakfast – Financial Education for All Americans \(National Ballroom AB\)](#)
- Introduction of Keynote: Idaho Treasurer Julie Ellsworth
 - Keynote Speaker Rachel Marie Martin, Author, *The Brave Art of Motherhood*
- 9:00 AM: [Panel 4: How to Create A Financial Empowerment Commission in Your State](#)
- Kentucky Treasurer Allison Ball
 - Matt Frey, Exec. Director, Kentucky Financial Empowerment Commission
 - Rachel Marie Martin, Author, *The Brave Art of Motherhood*
 - Grant Wallace, Co-Deputy Treasurer, Arkansas Treasurer of State
- 10:00 AM: [Workshop – Transparency Model with Utah Auditor John Dougall](#)
A step-by-step walk through towards creating state transparency
- 11:00 AM: NETWORKING BREAK

- 11:15 AM: **Unclaimed Property Issues: Holder Education, Constitutional Amendments, and Creative Ways to Educate State Citizens**
- Louisiana Treasurer John Schroder
 - Lorrان Ferguson, Director of Unclaimed Property, Kentucky Treasurer's Office
 - Joseph Marcelonis, Kroll Government Solutions

- 12:15 PM: **Closing Lunch – The Battle Continues for Government Transparency**
- **Keynote Speaker Adam Andrzejewski, CEO/Founder**
OpenTheBooks.com

FOR MORE INFO VISIT SFOF.COM/ORLANDO

Email us if you have questions!

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