





















## Melissa Conyears-Ervin

TREASURER



Friends,

Welcome to the 2024 Building Wealth Today for Tomorrow Financial Empowerment Summit! On behalf of my entire office and our esteemed sponsors—US Bank, CIBC, Wells Fargo, Chase, Ariel Investments, TransUnion, Verizon, Self-Help Federal Credit Union, and ABOC—I am thrilled to have you join us for an incredible day of learning, connecting, and aspiring towards being the best we can be.



We have designed this event to be transformational—a one-stop experience for resources, advice, and strategies to help you immediately empower and elevate your financial well-being. Success is never built alone, and today, we come together to turn our dreams into action.

Whether you're looking to illuminate your tomorrow or the next generation's, we are proud to offer invaluable workshops and seminars on essential topics such as credit and money management, homeownership, small business development, retirement planning, and more. Be inspired by the stories and strategies of our keynote speakers, including Mathew Knowles, Keke Palmer, and Larenz Tate.

I invite you to network, explore, connect, and create the blueprint for your financial future. No matter where you are on your financial journey, there is something here for you. The wisdom within these walls today is worth its weight in gold. The resources we've gathered will inspire and empower you to reimagine your relationship with wealth and your potential to build it for your family, your business, your community—and your future.

Melissa Conyears Ervin
Chicago City Treasurer

H5,2%

BWTT 2024 Pg 2



### OFFICE OF THE MAYOR

CITY OF CHICAGO

BRANDON JOHNSON MAYOR



#### **PROCLAMATION**

WHEREAS, financial empowerment and education is vital for residents to live successful and productive lives; and

WHEREAS, the Office of the Chicago City Treasurer will host the 4<sup>th</sup> Annual Financial Empowerment Summit focused on helping residents, small businesses, and entrepreneurs; and

WHEREAS, financial empowerment is an essential element of community development, job creation, and individual success, helping residents and businesses to thrive in a dynamic, evolving economy; and

WHEREAS, this 1-day financial services summit will provide opportunities for residents, small business owners, and job seekers to engage with city resources, job opportunities, and current trends in the finance world, ensuring equitable access to tools for financial success; and

WHEREAS, the City Treasurer's Office, under historic leadership, is devoted to driving equitable economic development, with a focus on empowering neighborhoods through the promotion of financial literacy, wealth-building, homeownership, and small business growth and development; and

WHEREAS, it is essential to bring forward ideas and strategies that will encourage our residents to achieve financial freedom, and that this summit serves as an opportunity to inspire, educate, and uplift all who participate;

NOW, THEREFORE, I, BRANDON JOHNSON, MAYOR OF THE CITY OF CHICAGO, do hereby proclaim October 12, 2024 to be BUILDING WEALTH TODAY FOR TOMORROW FINANCIAL SUMMIT DAY IN CHICAGO and encourage all residents to take advantage of this important resource.



#### ROBIN L. KELLY 2ND DISTRICT, ILLINOIS

2329 RAYBURN HOUSE OFFICE BUILDING WASHINGTON, DC 20515 PHONE: (202)225-0773 FAX: (202) 225-5681

#### Congress of the United States House of Representatives

DISTRICT OFFICES: 600 HOLIDAY PLAZA DRIVE SUITE 505 MATTESON, IL 60443 (708) 679-0078

www.RobinKelly.house.gov

WHEREAS, on October 12, 2024, we will celebrate the 4th annual Building Wealth Today for Tomorrow Financial Empowerment Summit (BWTT), hosted by the Chicago City Treasurer's Office;

WHEREAS, the Chicago City Treasurer, Melissa Conyears-Ervin, serves as the banker, investor, and custodian of public funds for the City of Chicago, overseeing a \$9 billion portfolio dedicated to safeguarding and enhancing the city's investments;

WHEREAS, This summit is a resource for Chicago residents and local businesses, offering critical tools and knowledge to support their success in a constantly changing economy;

WHEREAS, the purpose of the Building Wealth Today for Tomorrow Financial Empowerment Summit (BWTT) is to showcase the achievements and contributions of community organizations and industry leaders, while offering valuable resources, networking opportunities, and professional development workshops aimed at creating long-term wealth;

WHEREAS, the Chicago City Treasurer's Office annual Building Wealth Today for Tomorrow Financial Empowerment Summit (BWTT) has grown to become a significant event in Chicago, highlighting the importance of financial literacy while promoting the advancement and empowerment of small businesses;

WHEREAS, The Building Wealth Today for Tomorrow Financial Empowerment Summit (BWTT) represents an important opportunity to inspire, educate, and uplift Chicagoans, equipping them with the knowledge and tools to achieve financial independence and success; and

NOW, THEREFORE, BE IT RESOLVED, BY THE HOUSE OF REPRESENTATIVES OF THE UNITED STATES OF AMERICA that the hard work and service of the Chicago City Treasurer's Office Building Wealth Today for Tomorrow Financial Empowerment Summit (BWTT), is recognized and honored.

Sincerely,

Robin Kelly Member of Congress

+5.2%

BWIT 2024 Pg 4

# Small business, big impact.



U.S. Bank supports the small businesses and business development programs that build and sustain our community. We value the role small businesses play in providing jobs, contributing to local charities, and shaping the identity of our community. Local businesses are proof that with vision and determination, we can create our own possibilities.

U.S. Bank is proud to support BWTT.

Cosmopolitan IL 801 N Clark St, Chicago, IL 60610-6844





# MAINSTAGE

Time: 10:00 AM

Opening and Welcome by Chicago Treasurer, Melissa Conyears-Ervin

**UIC Lobby** 

Join us for the official opening of the summit with a ribbon-cutting ceremony with elected officials and community leaders.

Time: 10:15 AM

Chicago Treasurer Office Scholarship Acknowledgement

Main Stage

Speaker(s): Treasurer Melissa Conyears-Ervin

Treasurer Melissa Conyears-Ervin welcomes the 2024 class of scholarship recipients on behalf of the Treasurer's Office.

Time: 10:30 AM

Sponsor Spotlight with Wells Fargo

**Main Stage** 

Moderator: Radio personality Ramonski Luv, 95.1 FM Chicago

**Speaker(s)**: Robert Lay, Chicago District Manager; Paula Grantt, Neighborhood Housing Services, and Aldo Quinones, LMI Housing

Join BWTT sponsor, Wells Fargo, as they share about their expansion in Chicago and the housing resources available to the community. We are excited about their support of our financial summit.



Time: 11:00 AM

Fireside Chat with Larenz Tate: All In the Family, Generational Wealth

Main Stage

Speaker(s): Larenz Tate

Join Larenz Tate and Treasurer Melissa Conyears-Ervin for an insightful discussion on keeping business in the family and job creation.

Time: 12:00 PM

All You Need to Know About Community Development Financial Institutions (CDFIs)

Main Stage

Speaker(s): Local CDFIs

Join us for an in-depth workshop designed to explore the pivotal role of Community Development Financial Institutions (CDFIs) in fostering economic growth and stability in underserved communities. This session will provide a comprehensive overview of CDFIs, including their mission, impact, and the unique financial products and services they offer.



Time: 1:00 PM

The DNA of Achievers with Mathew Knowles

Presented by: US Bank

Main Stage

Speaker (s): Mathew Knowles

Dive into the world of small business success with Mathew Knowles and US Bank. This engaging conversation will explore what makes achievers stand out in business.

Time: 2:00 PM

Money Matters Institute: Building Your Generational Wealth

Main Stage

Speaker(s): Huntington Bank & Center for Changing Lives

What are your best financial choices to build generational wealth for you and your family? You don't have to be a star to build wealth. Learn how to save early, invest for growth, and align your financial choices with your personal and family goals. Then pass that financial wisdom to future generations.



Time: 3:00 PM

Master of Me: The Secret to Controlling Your Narrative

Main Stage

**Speaker(s)**: Keke Palmer & Treasurer Melissa Conyears-Ervin

Join KeKe Palmer and Treasurer Melissa Conyears-Ervin for an engaging conversation on the main stage as she discusses controlling her own narrative. KeKe will discuss her various entrepreneurial ventures and her journey through them.

Time: 4:00 PM

Empowering Entrepreneurs: Old National Bank's Small Business Programs

Main Stage

Presented by: Old National Bank

Join us for a workshop where you'll discover how to access essential resources and support for your small business. Learn directly from Old National Bank's experts about their tailored programs designed to fuel your growth, and hear a firsthand success story from a satisfied client. Empower your business with the insights and inspiration you need to thrive.



# **SEMINARS**

#### 12:00 PM SESSIONS

## Home Repair and Restoration: Unlocking Funding and Resources

#### Room D

**Speaker(s):** Chicago Housing Trust/DOH, Neighborhood Housing Serivces (NHS), & Rate

Are you looking to repair, fix, or restore your home but unsure where to start? Join us for an informative and engaging workshop designed to help you navigate the world of funding and resources available for home improvement projects. This workshop will feature representatives from various State and City Agencies who are eager to assist you in making your home a safe and comfortable place to live.

#### Credit 101 Session with TransUnion

#### Room E

Speaker(s): TransUnion

Join us for an informative workshop presented by TransUnion, designed to help you understand the fundamentals of credit. This session will cover essential topics such as credit reports, credit scores, and the importance of maintaining healthy credit habits. Whether you're new to credit or looking to improve your credit, this workshop will provide valuable insights and practical tips.

#### Empowering Survivors: Navigating Support Programs - Learn about City of Chicago Crime Victim Compensation

#### Room F

**Speaker(s)**: Chicago Department of Public Health - CSCC, moderator; Institute of Nonviolence Chicago & Together Chicago

Join us for an insightful and impactful workshop focused on the various crime victim programs available in the city of Chicago. This session aims to bring together community members and service providers, to discuss the comprehensive support systems in place for victims of crime and their families in Chicago.

#### Investing is for Everyone

#### Room H

Speaker(s): Chase

Description: Learn investing basics, understanding your financial goals, choosing your investing account types, understanding asset classes and diversification, choosing how you want to invest and maintain your portfolio.

#### **Home Ownership with Rate**

#### Room I

Speaker(s): Rate

Participe en el taller de Rate sobre "Programas de Vivienda y Propiedad de Hogar," donde descubrirá cómo convertir el sueño de tener su propio hogar en realidad. Aprenda sobre los diversos programas de financiamiento y asistencia disponibles, diseñados para apoyar a compradores de viviendas en todas las etapas. Nuestros expertos le proporcionarán orientación y recursos personalizados para ayudarlo en cada paso del proceso. ¡No se pierda esta oportunidad para informarse y empoderarse en su camino hacia la propiedad deuna vivienda!

#### 2:00 PM SESSIONS

# Demystifying Homeownership with Self Help Credit Union

#### Room D

Speaker(s): Self Help Credit Union

Join us for an insightful workshop on homeownership, presented by Self-Help Credit Union. This session will provide valuable information and resources to help you navigate the journey to owning your home. Our experts will cover essential topics such as budgeting for a home, understanding mortgage options, and the steps to qualify for homebuyer assistance programs. Whether you're a first-time homebuyer or looking to improve your financial literacy, this workshop is designed to equip you with the knowledge and tools needed to achieve your homeownership goals.

# Investing for Change: Black Leaders Shaping the Future of Chicago Real Estate

#### Room E

Speaker(s): Black Girls Buy Buildings (Nia Hall and Nia Randall), moderators; AJ Patton, Phil Beckham, Bonita Harrison, & Cornelius Griggs

In this workshop, you'll hear from important leaders in the community development industry. We will explore the unique challenges and opportunities faced by Black developers and gain insights into effective strategies for driving positive change in their communities.

# Introduction to Banking with Chase: Developing Banking Relationships

#### Room F

Speaker(s): Chase

In this interactive session, you'll learn everything you need to know about banking to get started. We'll cover banking basics, how to open your first accounts, and tips for smart banking.

### **SEMINARS** CONT.

#### Proven Strategies to Scale Your Business to \$1 Million & Beyond: With Insights from a Successful Chicago Entrepreneur

#### Room I

Speaker(s): The Joseph Business School

Join Joseph Business School for an enlightening workshop focused on small business growth. This session will provide comprehensive insights into advancing your small business and using Chicago resources to help with that growth.

# Hispanic Based Conversation: Understanding Small Business Financing Options (Espanol Only)

#### Room H

Speaker(s): BMO, Leticia Flores-Poole

Únase a nosotros en un taller especial de BMO, "Programas de Pequeñas Empresas," donde explorará las diversas opciones y recursos que BMO ofrece para apoyar a las pequeñas empresas. Descubra cómo aprovechar estos programas para impulsar el crecimiento de su negocio y obtener orientación personalizada de nuestros expertos. ¡No se pierda esta oportunidad para fortalecer su negocio y alcanzar nuevos éxitos!

#### 4:00 PM SESSION

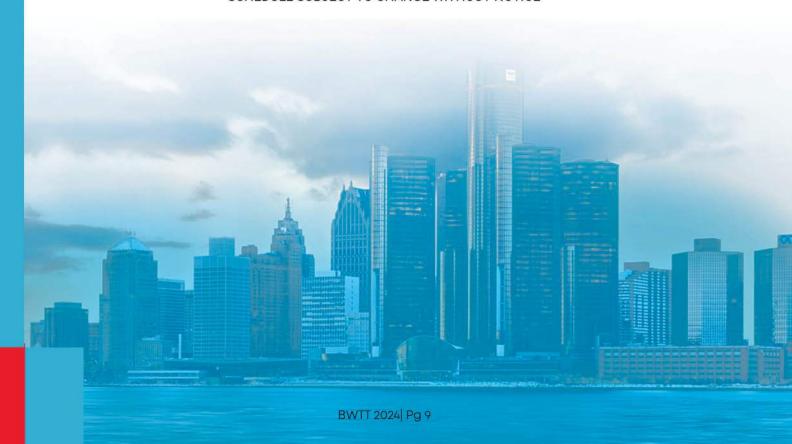
Hispanic Based Conversation: Banking (Espanol Only) "Introducción a Instituciones Bancarias"

#### Room H

Speaker(s): Chase

Aprende conceptos basicos del Sistema Bancario. Hablaremos acerca de como abrir tus primeras cuentas bancarias y consejo de como manejar tus financas.

\*\*\*SCHEDULE SUBJECT TO CHANGE WITHOUT NOTICE\*\*\*



# BUILDING EALTS TODAY FOR CORROLL

FINANCIAL EMPOWERMENT SUMMIT

**FEATURING** 

# MATHEN KNOWLES

1 PM • MAIN STAGE - EXHIBIT HALL

# **YOUNGADULTS**

#### **BWTT SUMMIT**



Time: 11:00 AM

#### Youth Voices: Leading with Purpose

#### Room G

Speaker(s): Nicole Orduno, Keith Tankson, & Neveah

The Youth BWTT Summit kicks off with an opening panel focused on leadership. Join us upstairs for an inspiring start. This session will explore the unique challenges and opportunities faced by youth in leadership roles and how they are redefining success and leadership in their respective industry. Our panelists will share their personal journeys, insights on effective leadership, and strategies for achieving success in a rapidly evolving world.

Time: 12:00 PM

#### **Lunch & Learn: Business Plan Building**

#### Room G

Speaker(s): Old National Bank

Join us for an engaging and interactive lunch session designed specifically for young aspiring entrepreneurs. This session offers a unique opportunity for youth to dive into the world of business creation and development.

#### Influence to Income: Teaching Youth to Monetize their Social Media Presence

#### Room G

Speaker(s): Trey White (moderator), Jermaine Banks, Scarlett, Kevin White, Maya Reese, & Angeline Abey

Join a panel of influential social media experts for an engaging discussion on monetizing your social brand and presence. This session will explore various strategies to transform your online influence into a sustainable income stream. Our panelists will share their personal experiences and insights, providing practical advice on how to effectively monetize your social media platforms.

Time: 3:00 PM

#### Master of Me: The Secret to Controlling Your **Narrative**

#### Main Stage

Speaker(s): Keke Palmer and Treasurer Melissa Conyears-Ervin

Join KeKe Palmer and Treasurer Melissa Conyears-Ervin for an engaging conversation on the main stage as she discusses controlling her own narrative. KeKe will discuss her various entrepreneurial ventures and her journey through them.

\*\*\*SCHEDULE SUBJECT TO CHANGE WITHOUT NOTICE\*\*\*



Running a small business has never been more complex. Verizon Small Business Digital Ready can help. It's a free program designed to give small businesses like yours more tools to succeed in today's digital world.

Verizon Small Business Digital Ready was developed in partnership with small business owners like you, who understand what it takes to succeed in the digital economy. The program is simple to use, with all the information available online in one place. After getting to know your business, we'll provide resources, networking and coaching tailored to your specific needs.

The program can help your business move forward in four ways:



#### Personalized learning

Start with the topics that are most important to your business right now. Content is presented by small business owners like you, and the brief, information-packed lessons will give you strategies you can use right away. As you complete the learning modules, you'll unlock new benefits, like coaching sessions on related topics.



#### Expert coaching

Get guidance from business experts across legal, marketing, business planning and more. They will help you to apply what you know and what you're learning to execute your plan of action.





next street

#### **Peer networking**

Connect with other small businesses and build your network! Share industry information or connect on future business opportunities - it's up to you.



#### **Incentives**

By participating in the program, you'll benefit from a marketplace of tools, solutions, products and services that can help move your business forward. You'll also be eligible to apply for grant funding exclusive to users of Verizon Small Business Digital Ready.

Our communities need diverse and thriving businesses. That's why Verizon is committed to providing support for 1 million small businesses over the next decade—including yours.

Because at Verizon, we believe no small business should be left behind. This is Citizen Verizon, our plan to move the world forward for all.

Get more details and sign up at verizon.com/digitalready



Verizon Small Business Digital Ready content is provided for informational purposes only, and Verizon makes no guarantees regarding, nor is not responsible for, your useor implementation

#### Proud to Support Building Wealth Today for Tomorrow Financial Empowerment Summit



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For our communities.
For all of us.



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# **BUILDING WEALTH TODAY**











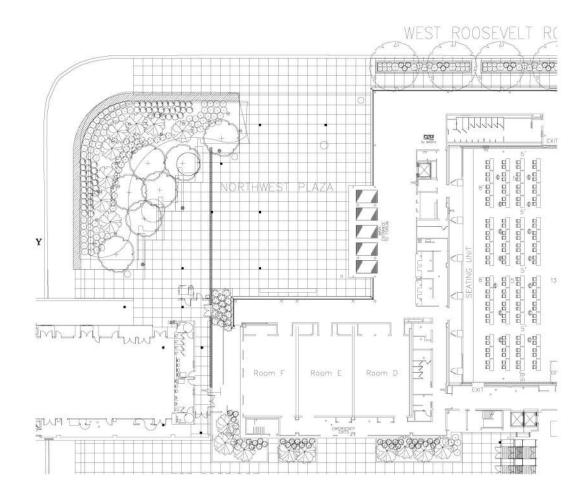






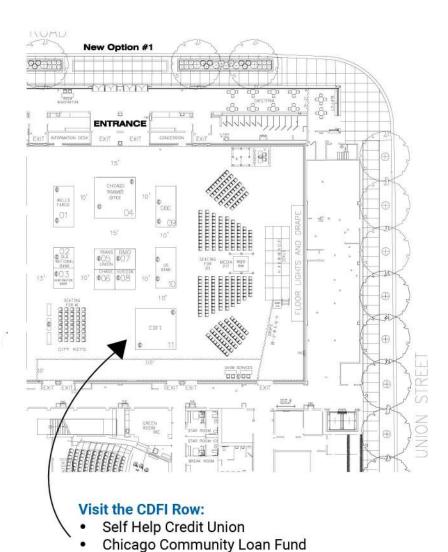


Credit Union 1



# **EXHIBIT FLOOR**

# **FOR TOMORROW**



















#### First Eagle

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# **EXHIBIT FLOOR**

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Brighton Park Neighborhood Council

**Empowerment Resources International** 

**US Army National Guard** 

C3 Impact Fund

Illinois Tollway

Illinois State Treasurer's Office

**Neighborhood Housing Services of Chicago** 

Pursuit

tD2R, LLC

The OCC

Nationwide Retirement Solutions

Illinois Department of Veterans Affairs'

Office of the City Clerk - CityKey

Unique Family Services Nfp

312 Baseball Lab Foundation

Office of the Clerk of the Circuit Court of Cook

County-Iris Y. Martinez

The Resurrection Project

Metropolitan Water Reclamation District of

**Greater Chicago** 

Bettering Lives with Bellows, LLC

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Through our specialty programs, we're working toward zero barriers for your business by offering access to working capital, educational resources and partnerships.

Learn more at **bmo.com/zerobarriers**.



**BMO** 



Accounts are subject to approval and are provided in the United States by BMO Bank N.A. Member FDIC

# **CIBC**

# Let's change our communities for the better

We are committed to lending a helping hand for the causes that are important to our community. That's why CIBC is proud to support the Chicago Treasurer's Office and Building Wealth Today for Tomorrow 2024 Financial Empowerment Expo.

To learn more about CIBC visit cibc.com/US

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# KEKE PALMER

3 PM • MAIN STAGE - EXHIBIT HALL

# Investing in growth

Sound financial health helps set the foundation for strong and resilient households, communities and economies. We want to help people manage their day-to-day financial lives.

We are proud to invest in Chicago and help to drive inclusive, economic growth for all.



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#### **JPMorganChase**



# <del>Im</del>possible

When we invest in our communities, we help turn impossible challenges into possible solutions. Preparing people, businesses and communities for financial success leads to brighter futures for us all.

Wells Fargo is proud to sponsor the Building Wealth Today for Tomorrow summit.

wellsfargo.com/impact





**ACTIVE PATIENCE®** 

Good outcomes take time.

While our investment approach is time-tested, our learning is never done.



IN PROUD SUPPORT OF THE

**BWTT Financial Empowerment Summit** 



# **Financial Inclusion**

Is Central to Our Mission of Information for Good®



How we show up for the communities where we live and work matters. That's why TransUnion is pleased to sponsor Building Wealth Today for Tomorrow in support of Chicagoland consumers' financial well-being.





#### **GUARDIANS**

Typically invest in companies they have a connection with or their is already some working understanding of the investment

#### **TYCOONS**

Typically invest in companies that show growth potential and mainly focuses on the financial picture

#### **DIPLOMATS**

Typically invest in companies after reviewing extensive research on the company and would want to ensure it is a company of good standing

#### **LUMINARIES**

Typically invest in companies that are innovative and have strong market reach and awareness

### Take the Quiz



Scan QR Code

GUARDIANS join us from 11:30 AM - 12:30 PM
TYCOONS join us from 12:30 PM - 1:30 PM
DIPLOMATS join us from 1:30 PM - 2:30 PM
LUMINARIES join us from 2:30 PM - 3:30 PM

**INSIDE THE EXHIBIT HALL** 



# Building Wealth Today for Tomorrow (BWTT) Financial Empowerment Summit





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Self-Help Federal Credit Union is a proud supporter of "Building Wealth Today for Tomorrow"









### NOTES

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### NOTES

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#### **UPCOMING EVENTS**



Job Seekers Register HERE.

Register at the Link:

https://rb.gy/gnljim

Discover your path to success and unlock the potential of your career journey!

BMO (A





#### Comprehensive Recap

Over the course of this session's workshops, we've explored risk, insurance, building generational wealth, and making strategic financial choices. In our final session, we'll go over it all! Whether you missed a few sessions or want

a review, this recap has you covered!



In-Person

9:00 AM-12:30 PM BUILD INC - AUSTIN



Register and attend any MMI session to receive access to FREE 1:1 financial coaching!

All events within this program are accessible for all.

To learn more & register, visit: www.chicagocitytreasurer.com/mmi











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Melissa Conyears-Ervin

# BUILDING WEALTH TODAY FOR TOMORROW

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