



OFFICE OF THE
ARIZONA STATE TREASURER

KIMBERLY YEE
TREASURER



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CONTACT: Shaandiin Parrish – Public
Information Officer
shaandiinp@aztreasury.gov
(602) 542-7843

Arizona State Treasurer Kimberly Yee Appoints Statewide Financial Literacy Task Force

PHOENIX, AZ – Today Arizona State Treasurer Kimberly Yee announced the first statewide Financial Literacy Task Force in an effort to help residents of Arizona attain a better understanding of personal finance life skills.

"A cornerstone of my Administration is advancing financial literacy so Arizonans can attain financial freedom," said Treasurer Kimberly Yee. "It is my hope that individuals, from young students in classrooms to seniors and veterans who are on fixed income budgets, have an opportunity to better understand how they can manage their money."

The State Treasurer's Financial Literacy Task Force will examine the landscape of financial literacy across Arizona's communities and identify opportunities for improvement.

"Arizona and the nation are facing alarming negative trends in the area of personal money management and this needs to be reversed. There are dangers to the downward spiral of debt and it directly affects our economy," said Treasurer Kimberly Yee.

The Task Force is the next step in Treasurer Yee's longstanding advocacy to increase financial literacy in Arizona. As Treasurer, she led the initiative requiring Arizona high schools to teach financial education before graduation ([Laws 2019, Chapter 84](#)). As a member of the Arizona Legislature, she passed laws requiring the state's K-12 academic standards to include financial literacy and established a seal of financial literacy on diplomas that may be earned by graduating high school seniors .

The 17-member Financial Literacy Task Force, chaired by Treasurer Kimberly Yee, will meet on a quarterly basis starting on June 25, 2019 at 10:00 A.M. in the Office of the Arizona State Treasurer. The media is welcome to attend. A list of the task force members is attached.



Arizona Treasurer Kimberly Yee

FINANCIAL LITERACY TASK FORCE

Mission Statement:

To advance financial literacy throughout the state of Arizona, ensuring all Arizonans have the opportunity to attain proficiency in basic money management.

Purpose:

1. Examine the landscape of financial literacy across Arizona's communities.
2. Identify and explore opportunities for improvement.
3. Make recommendations to improve financial capability among Arizonans.
4. Implement an action plan based on those recommendations.

Task Force Appointees:

1. Michael T. Allen, CPA, *Audit & Assurance Principal, REDW LLC.*
2. Michele Bentivegna, *School Teacher*
3. Katherine Kemmeries Cecala, *President, Junior Achievement of Arizona*
4. Austin DeBey, *Vice President of Legislative Affairs, Mountain West Credit Union Association*
5. Holly Donahue, *Market Sales Director, Dignity Memorial Funeral Homes*
6. Paul Hickman, *President & CEO, Arizona Bankers Association*
7. Curt Krizan, *Chief Financial Officer, Fiesta Bowl*
8. Hon. Leah Landrum Taylor, *Assistant Director, Arizona Department of Economic Security, Former Arizona State Senator*
9. Sharon Lechter, *Best-Selling Author and Motivational Speaker*
10. Dr. Tommy Lewis, Jr., *Superintendent of Schools, Department of Diné Education*
11. Larry Mathis, CFP, AIF, *Founder & CEO, Mathis Wealth Management*
12. Pam Morrison, *Community Relationship Officer, Phoenix Rescue Mission*
13. Sue Perry, CRC, ERPA, *President, Edberg Perry, Inc.*
14. Reggie Yates, *Major, United States Army, 2013 Inductee in the Arizona Veterans Hall of Fame*
15. Elena Zee, CFP, *President & CEO, Arizona Council on Economic Education*
16. Cynthia Zwick, *Executive Director, Wildfire: Igniting Community Action to End Poverty in Arizona*

