

2025 REGIONAL FINANCIAL EMPOWERMENT CONVENTION

OnCenter • Downtown Syracuse • Saturday, April 12, 2025



EVENT OVERVIEW

DRAFT as of 11/14/24

Subject to change

Date: Saturday, April 12th, 2025

Time: 8:00 a.m. - 6:00 p.m. EST | Indoor Block Party & Step Show 6-8 p.m.

Location: The Oncenter, 800 South State Street, Syracuse, NY 13202

Website: www.financialempowermentsummit.org

Projected Attendance: 1,000 people

Stakeholders/Audience Composition:

The Financial Empowerment Convention aims to be comprehensive, topically diverse and bring together cross-sectional community collaborators engaged in anti-poverty programs.

Collaborators include municipal, county and state government; nonprofit organizations; the for-profit business sector; community foundations; academia; grass-roots community organizations; prospective attendees; and individuals and organizations already engaged in asset-building initiatives.

Geographical draw: Syracuse and surrounding communities, in addition to Binghamton, Albany, Rochester, and Buffalo

Original Slogan/Tagline: Diverse Community Collaboration

New Revised Theme: Festival-themed, where *There's something for everyone!*

Dress Code/Attire: Business Casual or high-end recreational streetwear; best or favorite tennis shoes/sneakers

Unique Value Proposition: The first and only financial literacy conference/convention of this scale and magnitude in Syracuse's history.

Workforce: The producer will primarily contract women and minority vendors in the execution of the conference.

Host: Strategic Resources Management Corp.

About Strategic Resources Management:

Strategic Resources Management is a 501(c)3 organization established in 2016. SRM Corp. harnesses human and social capital, information and financial literacy education in order to help people become economically self-sufficient and achieve upward socioeconomic mobility.

The definition of poverty is lack of resources, and SRM's mission statement is to coach low-to-moderate income individuals on how to strategically manage their resources: maximize their time, steward their money, leverage human/social capital, and utilize information in a way that aligns their goals, knowledge and efforts with their personal vision statements and business plans.

Individual donors and contributing organizations will receive a tax-deductible letter to the extent allowable by New York State law.

Convention Overview/Description:

April is Financial Literacy Month. The Financial Empowerment Summit—presented by M&T Bank—was poised to occur April 25, 2020, and then the once-in-a-lifetime worldwide pandemic hit. The dream was deferred for two years, coupled with the fact that the executive producer was in the throes of running the minority chamber of commerce. Nevertheless, the virtual community program made its debut on April 9, 2021. The 2025 conference is being scaled up as a regional convention and promises to be bigger and better than before!

The original vision has not changed: to customize financial literacy topics for various affinity groups since one shoe does not fit all. College students facing student loan debt. Working professionals who need to plan for retirement and estate planning. Seniors who are the target of fraud and financial abuse. Entrepreneurs in their continual quest for access to capital. The middle class who are entangled in debt but nonetheless aspire to wealth and philanthropy. The underbanked low-to-moderate income individuals who dream of becoming middle class.

Award-winning: The Financial Empowerment Summit was a recipient of the Anthem Award, a worldwide award celebrating purpose and mission-driven work in 2022. To this day, it is unknown who nominated the conference for this prestigious recognition. The beautiful, impressive statuette will be displayed during the Financial Empowerment Convention for the community to share in its success.

Tentative Schedule (subject to change):

8 a.m.

Registration and Continental Breakfast

9 a.m.

Welcome and Introductory Remarks

1/2 hour transition

10-11:30 a.m.

Concurrent Breakout Sessions 1

2-hour transition until the next session

12 Noon - 1:30 p.m.

Lunch and Exhibition/Vendors and Networking

1:30-3 p.m.

Concurrent Breakout Sessions 2

1/2 hour transition

3:30-5 p.m.

Concurrent Breakout Sessions 3

1/2 hour transition

5-5:30 p.m.
Closing Ceremonies

1/2 hour transition

6-8 p.m.
Indoor Block Party & Step Show
Dance the night away with Pop, R&B, Soul, Funk, Afro-beats, Caribbean and Latin music to celebrate your financial literacy journey!

Exhibitions, Roundtable Discussions and Affinity Group Receptions will occur simultaneously at various times throughout the day at the convention center.

Target Audiences/Affinity Groups:

- Middle-class individuals
- Low-to-Moderate Income Individuals
- College Students and Young Adults
- Seniors
- African Americans
- LatinX/Hispanics
- New Americans and Immigrants
- Military Veterans
- Persons with Disabilities
- Working-class Professionals
- Entrepreneurs and Business Owners
- Faith-based individuals
- Other under-represented and marginalized groups

Core Topics

- Budgeting, Spending Plan and Saving
- Credit Card and Consumer Debt Management
- Credit Reports, Scoring and
- Identity & Cyber Theft and Fraud Protection
- Repair
- Homeownership
- Buying or Leasing a Car
- Student Loans
- Business Capital and Finances

Specialty Topics

Personal Stories

- Personal accounts of individuals willing to share their stories of transitioning from abject poverty to upward socioeconomic mobility

- Personal accounts of community leaders willing to share their stories of health & medical crises and their road to recovery
- Helping others and achieving success, but at what cost? It's not just about the money. What does it really take to live the life you dream of and desire?
- How Syracuse's Power Couples manage their money and finances

Community Philanthropy and Community Development

- What's the difference between the "Top 3" local foundations? The CNY Community Foundation, The Gifford Foundation, and The Allyn Family Foundation
- Economic Development and Revitalization of Syracuse's Southside

Professional Development

- Employee Benefits & Disparities: Taking a closer look
- The fine art of Strategic Networking to get a promotion or job that's the right fit for you to advance your career
- What does your social media profile say about you? Is it helping or hindering your job search?

Entrepreneurship

- What's the difference between a Hobby, Side Hustle, Entrepreneurship and Business Ownership?
- How chambers of commerce can help your business grow and succeed
- Entrepreneurial and access to capital resources to help you start and grow your business
- What are various POS (point of sale) instruments available to me as a merchant/vendor?
- What are your business' Cash Flow projections? (Equally important as the Balance Sheet and Profit & Loss Statement)
- The triumphs and challenges of selling products and operating a brick-and-mortar business
- How do I price my professional services for profitability as a consultant?
- Powerful Women in the Construction Industry from Syracuse, Rochester and Buffalo

Fusion between Professional Development and Entrepreneurship

- How do you know when it's time to leave your day job and start or grow a business?
- Hybrid Professionals: Senior-level managers who also lead mature business enterprises
- Meet high-functioning professionals & entrepreneurs generating Multiple Streams of Income

Seniors

- Medicare and Medicaid
- Estate and Succession Planning, Wills & Trusts. What happens to my assets after...?
- What are the secrets to aging gracefully and living a long, healthy, purpose-driven life?

Affinity Group Tracks & Topics

- Financial Literacy En Español (presented by M&T Bank)
- Financial Literacy for Faith-based Individuals: Poverty, Prosperity or Stewardship?
- Arts Entrepreneurship: creative ways visual and performing artists have learned how to monetize their talents to generate income and revenue
- Profile of and Resources for Veteran Entrepreneurs & Business Owners in our Community
- Scholars in our community will share excerpts of their dissertation thesis research studying the intersectionality between race and gender diversity, and socioeconomics

Affinity Group Receptions:

- Professionals in Diversity, Equity and Inclusion (DE&I)
- Certified Minority & Women-owned Business Enterprises (MWBE)

Health and Wellness: Nutrition, Heart Health, Diabetes, Breast Cancer, Alzheimer's, etc.

Screening Room

Many topics were recorded during the height of the pandemic. A screening room will be devoted to the purpose of viewing these recordings. These include philanthropy and legacy-building, and visionaries who produce economic development conferences in the Syracuse community.

Exercises: Vision boarding breakout sessions. Attendees will also have an opportunity to anonymously write their financial goals on a bulletin board in the lobby.

Exhibition: Priority status will be given to sponsors, minority and women-owned business enterprises, veterans, book authors, and the financial services sector: banks, credit unions and financial advisors. Non-profit organizations devoted to the health and wellness of the community are also welcome. The exhibition hall will be divided into Goods/Commodities, Financial and Professional Services, and Human & Social Community Resources.

Guerilla Marketing Strategy

1. Middle-class attendees will have the opportunity to register for admission.
2. Corporate Sponsors will have the opportunity to purchase tickets in blocks of ten (10) and allocate them to their company representatives, the staff of nonprofit organizations, and the nonprofits' ALICE (Asset Constrained, Income Constrained, Employed) and LMI (low-to-moderate income) clients.
3. Non-corporate sponsoring organizations will have the opportunity to purchase tickets in blocks of ten (10) and allocate them to their staff, the population they serve, and nonprofit organizations serving low-income individuals.
4. Sponsors will also have the opportunity to underwrite a budgetary line item.
5. A pre-conference booklet will be produced in early 2025 to encourage attendees to invite family, friends, neighbors, colleagues, etc. to attend the convention.

Sponsorship Benefits

- Admission Tickets
- Logo on digital and print collateral
- Vendor Table (optional)
- Branding on specific items the company or organization underwrites

Media

Broadcast, print, and social media representatives will be onsite at the event to provide coverage.

Hotel accommodations

A block of rooms with a group rate has been secured at The Marriott Residence Inn and The Marriott Courtyard on Fayette Steet in Downtown Syracuse.



About the Executive Producer

Me'Shae Rolling is a Certified Financial Literacy Educator and is the author of “How to Save Money & Organize Your Finances” as well as a Course Handbook on Financial Education. A serial entrepreneur, she has been in the Special Events, Conference and Hospitality industry for close to three decades.

Me'Shae made history in 2018 when she became the first Franchise Owner/Operator of EventPrep, Inc., in New York State and the northeastern territory. In addition to providing event services, EventPrep sources, procures and contracts hotel venues locally, regionally and nationally for clients in the market for overnight accommodations for their meetings, conferences, and events.

Me'Shae is the executive director emerita of The Upstate Minority Economic Alliance (UMEA), Syracuse and Central New York's minority chamber of commerce and was a SUNY Oswego School of Business Fellow in 2024. Prior to her chamber appointment, Me'Shae was the Director of Special Events & Conferences at the Institute for Veterans & Military Families at Syracuse University.

She presently serves on several boards of directors including the Onondaga Community College Foundation, The Central New York Community Foundation Black Excellence & Equity Fund, The Salvation Army, OnPoint for College, and the Small Business Development Center's Regional Advisory Board. Me'Shae has previously served on the boards of CenterState CEO, The Syracuse Rescue Mission, the American Heart Association's Circle of Red/Go Red for Women, The WISE Women's Business Center, and the CNY CASH Coalition Steering Committee (a United Way initiative).

She is a member of the Human Services Leadership Council, a local consortium of executive directors, and is a consultant for the WISE Women's Business Center, providing technical assistance to women entrepreneurs in their quest for NYS MWBE (minority and women-owned business enterprise) certification. In 2022, Me'Shae co-founded The TRIBE, a low-key, high impact strategic networking group of Syracuse's top Black and Latino leaders. She is also a member of other professional, social and civic organizations and enjoys contributing philanthropically to the community.

Me'Shae received the New York State 2023 MWBE Impact Award in Albany and the 2020 NAACP Madam C.J. Walker Small Business Award in recognition of her championship and ambassadorship for minority entrepreneurship.

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She earned her Master of Public Administration degree from The Maxwell School of Citizenship & Public Affairs at Syracuse University and is an alumna of Citizen's Academy.

Me'Shae has attended and presented at other national financial literacy education conferences, and felt the time is ripe for a vision conceived long ago to finally come to fruition in Syracuse, a city with one of the highest concentrations of poverty in America. Me'Shae is excited to merge her passion and training in financial literacy education; expertise in conference planning; and leverage her extensive network of relationships for the production of the financial empowerment convention as a labor of love for the Syracuse community.

She has been married to Dr. James H. Rolling, Jr. for 32 years. They met as graduate students at Syracuse University. They resided in New York City for 15 years and in Syracuse for 17 years. James is the Interim Chair of the Department of African American Studies at Syracuse University and is president emeritus of the 16,000-member National Art Education Association. Their home church is Abundant Life Christian Center in East Syracuse. Me'Shae is the doting aunt of six nieces and one nephew and enjoys watching Turner Classic Movies in her spare time.

If you are interested in being a Sponsor, Exhibitor, Attendee, or a combination thereof for the convention, then contact Me'Shae at meshae@rollingenterprises.com.

Thank you in advance for your support!