



Asset Building Forum I: Current Best Practice in Building and Preserving Wealth at Tax Filing

August 17, 2007

Purpose:

Share information on the current use of the Earned Income Tax Credit and present models that promote savings and preserve assets in low- and moderate-income communities during tax time.

- 9:00 AM** **Welcome**
- 9:10 AM** **Earned Income Tax Credit: The National, State and Local Picture**
National Perspective on EITC
Elizabeth Kneebone, Brookings Institution
- EITC in New York State
Alexandra Forter Sirota, Office of Regional and Community Affairs
- Local Campaigns
Mary Shaheen, United Way of New York State
- 10:00 AM** **Linking Asset Building to EITC**
Saving Refunds: The Savings Bond Pilot
Preeti Mehta, D2D Fund
- Alternatives to Refund Anticipation Loans
Deirdre Silverman, Alternatives Federal Credit Union
- Access to Banking and Financial Education
Rita Eygabroad, CASH Coalition of Rochester, New York
- 11:00 AM** **Q & A**
- 11:30** **Statewide Strategies and Resources:
A Discussion Facilitated by United Way of New York State**
- 11:50** **Next Steps**
- 12:00** **Networking Lunch**