Maverick Conference on Financial Wellness

April 17, 2026

Hosted by

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Maverick Center for Financial Success
MINNESOTA STATE UNIVERSITY, MANKATO

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Maverick Conference on Financial Wellness

Minnesota State University, Mankato
April 17, 2026

CSU BALLROOM

10:30 am	**Registration and Check-In**
11 am	**Welcome and Opening Remarks** Ishuan Li Simonson, Co-Director, Maverick Center for Financial Success Seung Bach, Dean, College of Business, Minnesota State University, Mankato Keynote Speaker: Kumar Balasubrahmanyan, Vice President of Innovation, Junior Achievement North
11:30 am	**Luncheon**
4:00 pm	**Closing Remarks** Ishuan Li Simonson, Maverick Center for Financial Success Sponsors Gift Drawing

Concurrent Sessions

CSU BALLROOM, 201, 202, 203, 204

The Art of Asking: Salary Negotiation Strategies that Work
Effective salary negotiation is both a strategic skill and an essential form of professional advocacy. This session will equip participants with practical techniques for preparing, framing their value, and navigating negotiation conversations with confidence. Attendees will leave with actionable tools to maximize their earning potential and achieve more equitable compensation outcomes.
Presenter: Katie Jolicoeur, Career Development Center, Minnesota State University, Mankato

Bank Smarter: No More Guesswork
College is often the first-time students are fully responsible for their own money, but most have never been taught how banking actually works. Bank Smarter: No More Guesswork gives students the confidence and practical know-how to control their finances. This

session breaks down the essential students' needs right now: how checking and savings accounts really work, strategies to avoid common fees, tips for using online and mobile banking tools effectively, and best practices to protect themselves from fraud. By the end, students leave with actionable skills they can use immediately, including no more guesswork.
Presenters: Melissa Diegnau, Minnesota State University, Mankato
Jen Faust, Pioneer Bank

Build Your PH&D Skills: AKA Your Competitive Edge
The term "soft skills" fails to capture the critical competencies that actually drive workplace success. This interactive session introduces the PH&D Model: Professional Skills that boost job performance, Human Skills that enable collaboration, and Durable Skills that sustain long-term career resilience. As AI continues reshaping the workplace, understanding which skills become more valuable is essential for financial professionals navigating career growth and stability. Participants will complete a self-assessment to identify their current skill profile, then analyze results to uncover strengths to leverage and gaps requiring development.
Presenter: Shane Bowyer, Minnesota State University, Mankato

Financial Aid and Loan Repayment: Workshop
Do you know how you are covering the costs of college? What does student loan repayment look like after graduation? In this interactive session, we will discuss the different ways to reduce loan indebtedness during college and cover strategies for financial success after graduation.
Workshop
Presenter: Rachel Sherlock, Office of Financial Aid and Scholarships, Minnesota State University, Mankato

Financial Literacy & College as a First-Generation Student
This session addresses a critical gap in first-generation student support: The period after college admission but before students feel comfortable navigating higher education by themselves. Our goal in this session is to guide students through these next stages after committing to college. This session will work to address

confusion, reduce stigma, and empower students to proactively seek answers and support.
Presenters: Iqra Mahamud, Center for Multicultural Equity & Access, Minnesota State University, Mankato
Abdurrahman Guantai, Center for Multicultural Equity & Access Minnesota State University, Mankato

Financial Planning Networking Event
MSU students have the opportunity to network with financial advisory firm leaders and financial professionals.
Appetizers and refreshments will be served. Stop in anytime to network with industry leaders.
Event Organizer: Daniel Hiebert, Minnesota State University, Mankato

Financial Planning Panel Discussion
This is a panel session made up of 4-7 MSU alumni financial planners who will answer questions from MSU about careers in financial planning.
Session Organizer: Daniel Hiebert, Minnesota State University, Mankato
Moderator: Aiden Hall, Minnesota State University, Mankato
Panelists: Charlie Frazzini, Great River Financial
Josh Wolberg, Great River Financial
Brooke Nelson, Community Resource Bank
Aidan Ryan, Fortress Financial Group
Nathan Faith, Boulay Financial Advisors
Evan Bachman, Mercer Advisors

JA Finance Park: The Student-Centered Simulation for Real-World Money Decisions
Junior Achievement Finance Park Mobile is a student-centered, experiential simulation where learners step into an adult role and make real-world financial decisions. Participants will see how this hands-on model boosts engagement while building financial capability and career readiness through budgeting and choice-based decision-making. Educators will walk away with concrete next steps to bring the simulation to their students, and community partners will see how to get involved in expanding access to this experience.
Presenters: Haley Geinnotta, Junior Achievement North
Katie Mons, Junior Achievement
Abbey Feenstra, Junior Achievement

Leading with Purpose: Women's Role in Financial Growth and Community Building
This panel features three women who are members of the "Book Club," a women's investment group founded ten years ago. Dr. Brenda Flannery, MSU Professor of Management, will facilitate a conversation on why and how investment clubs can provide women with support for both financial and personal wellbeing. Joining her are Minnesota State University, Mankato alumnae panelists Melissa Bradley '10, Owner/General Manager/ CFO of Snell Motors, and Christina Bohlke '01, Market President at BankVista. Additional discussion will explore the panelists' professional careers in finance and business ownership, as well as their experiences and leadership in fostering financial growth and community building.
Facilitator: Brenda Flannery, Minnesota State University, Mankato
Panelists: Melissa Bradley, Snell Motors
Christina Bohlke, BankVista

MCFS Coaches Financial Lightning Round
MSU students will have the opportunity to get personal financial guidance from MCFS coaches.
Student Coaches: Financial Planning Students, Minnesota State University, Mankato

Post College Factors on Financial Wellness
Graduation from a college or university requires a strategic approach to managing new financial responsibilities. This session explores the critical factors of financial wellness after graduation, including decoding employer benefits, managing for the unknown, and understanding the behaviors and attitudes that drive our money habits.
Presenters: Jason Kley, Sequoia
Selene Serkland, Sequoia

SPARKTalks
SPARKTalks are short presentations using visuals and brief texts to deliver clear expositions of research topics. In this session, you will learn about labor markets in the age of AGI, and age as your biggest financial advantage.
Presenters: Xinyan Shi, University of North Carolina, Pembroke

Ishuan Li Simonson, Minnesota State University, Mankato

Understanding Work Benefits with Individual Planning
Northwestern Mutual, Mankato will explore the various types of work benefits—such as health insurance, retirement plans, and paid leave—and how to evaluate their value relative to your personal and career goals. Attendees will learn strategies for comparing benefit packages and aligning choices with long-term financial and life-planning objectives.
Presenter: Ben Bartusek, Northwestern Mutual

Why We Buy: The Psychology of Spending & Self
Explore how emotions, identity, and social influence drive what (and why) we buy. Learn to recognize internal vs. external motivators, resist persuasive marketing tactics, and align purchases with personal values.
Presenter: Amanda Weister, Minnesota State University, Mankato

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MAVERICK CONFERENCE ON FINANCIAL WELLNESS 2026 STEERING COMMITTEE MEMBERS

Shane Bowyer
Associate Professor, Management

Samantha Campa
Internships & External Partnerships Coordinator, College of Business

Brenda Flannery
Professor, Management

Aiden Hall
President, Financial Planning Club

Daniel Hiebert
Associate Professor, Finance

Michael Lawrence
Vice-President, Student Executive Team, College of Business

Jae Min Lee
Professor, Consumer Studies

Ishuan Li Simonson
Conference Chair

Maya Nelson
President, Student Executive Team, College of Business

Rachel Sherlock
Associate Director, Office of Scholarship and Financial Aid

Mandy Weister
Assistant Professor, Management

Gwenn Wolters
Career and Technical Education Coordinator, South Central Service Cooperative

CONFERENCE SPONSORS

MavFund

The Maverick Student Investment Fund (MSIF) is a hands-on, three-credit elective course (FINA 493) offered every Fall and Spring semester at Minnesota State University, Mankato. Students manage over $860,000 in real assets for the University Foundation using a professional top-down asset allocation approach. They conduct sector research, analyze economic indicators, evaluate stocks, and present investment recommendations to the Foundation Investment Committee and Board. The course builds practical skills in financial analysis, communication, economic literacy, and disciplined decision-making while applying classroom concepts to real-world portfolio management. Participants gain valuable experience and professional deliverables that strengthen their resumes and career readiness in finance. For more information, visit cob.mnsu.edu/mavfund or contact Dr. Yuhao Chen at the College of Business.

The Financial Planning Program

The Financial Planning and Insurance emphasis in the Finance BS degree at Minnesota State University, Mankato, prepares students to plan and manage the financial interests of individuals. As a CFP Board Registered Program, it provides a direct pathway toward earning the prestigious Certified Financial Planner™ (CFP®) certification. Students develop essential skills in financial consulting and client relations, including the use of professional financial planning software, sales techniques, interpersonal communication, and expertise in key areas such as insurance planning, investment planning, tax planning, and estate planning. This emphasis equips graduates for rewarding careers in personal financial advising, financial consulting, and related fields, with strong support from the College of Business's hands-on resources like the Maverick Center for Financial Wellness. For more information, visit cob.mnsu.edu/programs/finance or contact Dr. Daniel Hiebert at the College of Business.

Biography of Program Panelists and Presenters

Kumar Balasubrahmanyan

A native of St. Paul, MN Kumar Balasubrahmanyan graduated from St. Olaf College with degrees in History and Exercise Science. Upon leaving college he served as an AmeriCorps Member at College Possible supporting high school students as they prepared for and applied to higher education. After two years of AmeriCorps service, Kumar joined the College Possible Leadership Team where he served in a variety of roles for over a decade. His positions ranged from Program Leadership, Community Partnerships, to External and Governmental Relations, ultimately serving as a member of their Senior Leadership Team. After his time at College Possible, Kumar became a Program Officer at a funding organization called LISC where he administered a grant program focused on the intersection of Employee Training and Financial Literacy. In this role he provided funding, technical assistance, and guidance to non-profit organizations dedicated to supporting economic mobility.

Kumar has spent the past three years serving as the Vice President of Innovation at Junior Achievement North. In this role he supports new initiatives and partnerships focused on expanding the impact and reach of Junior Achievement, an organization that strives to ensure all students can live choice-filled lives. This work has included establishing a new Instructional Model at the high school level focused on career readiness, financial literacy and project-based learning. Outside of the workplace, Kumar is a Board Member and co-founder of the Devin Smith Scholarship Foundation, which provides college scholarships for students at St. Paul Central High School.

Evan Bachman, CFP™, AWMA™

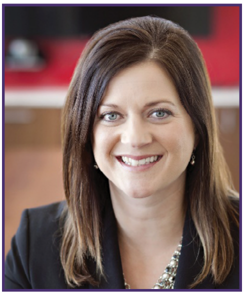
Evan is a Wealth Advisor at Mercer Advisors. He joined the firm in 2022 through the acquisition of Fure Financial where he served clients as a Financial Planner. Evan earned a B.S. degree in financial planning from MSU Mankato in 2021 and is a CFP professional and Accredited Wealth Management Advisor. He thrives at being able to help people and solve complex problems. Financial planning allows him to do both, while also creating long-lasting relationships.

Benjamin M. Bartusek, CFP®, ChFC®, CLU®

Ben is a financial advisor at Northwestern Mutual. He grew up in New Prague and was the youngest of 4 kids. He was an involved student participating in everything from athletics to academic clubs to theater/music. Ben attended St. Olaf College where he studied Social Studies Education & History. After his sophomore year, he began his career in the Northwestern Mutual internship program. He discovered that his role is to educate clients around what is possible in the financial world in order to help them live more intentionally authentic lives. Professionally he has achieved the following designations: CFP®, ChFC®, CLU®. Our clients appreciate how our team is always looking to grow both personally and professionally to best serve them.

Ben currently resides in Mankato, MN and when not in the office he spends his time doing the following: traveling, following the NFL & college basketball/football, volunteering with kids, going to concerts & shows, reading and pursuing performing arts interests such as performing in musicals, singing, and playing piano/guitar.

Christina Bohlke



Christina Bohlke serves as President of BankVista's Mankato Market, where she oversees market strategy, drives growth, and fosters relationship-focused banking across the Mankato region. With a strong background in commercial lending and executive leadership, she provides tailored financial solutions to businesses, families, and organizations. Christina earned a Bachelor of Science in Finance from Minnesota State University, Mankato in 2001. She is a 2017 graduate of the Graduate School of Banking at the University of Wisconsin and holds an Executive Leadership certificate from the Wisconsin School of Business. Christina has built her career around financial leadership and meaningful community engagement.

Beyond her professional role, Christina has a strong history of community involvement. She is currently serving as the board chair of the Mankato Area Foundation, reflecting her ongoing commitment to economic development, education, and philanthropy in the Greater Mankato area. Other organizations that Christina has served and continues to support include Junior Achievement, Mankato's 1 Million Cups, MSU Big Ideas Challenge, Children's Museum of Southern Minnesota, and ECHO Food Shelf.

Shane Bowyer

Dr. Shane Bowyer is the associate professor of Management and Entrepreneurship at Minnesota State University, Mankato. In addition to teaching, Bowyer has led the development of a new AgriBusiness and Food Innovation program and was the Director of the Center of Innovation & Entrepreneurship. Before returning to the classroom, Bowyer was the Institutional Director for Strategic Partnerships.

Prior to returning to Minnesota State, he was the Glen Taylor Chair of Business and Leadership at Bethany Lutheran College. Bowyer has also started four businesses and was a head baseball coach at two universities. Through one of his businesses, he also coordinated the Minnesota Vikings Training camp for 12 years in Mankato.

Bowyer has received the MinnState system Teacher of Excellence Award, the Claire E. Foust Public Service Award, the GMG Entrepreneur of the Year, and the GreenSeam Seamed in Success Award.

Melissa Bradley

Melissa Bradley is the Owner and General Manager of Snell Motors in Mankato, Minnesota, where she leads with a clear focus on delivering an honest, caring, and high-quality experience to every guest. Raised on a farm in northeast Iowa in a family of small business owners, Melissa developed an early appreciation for hard work and customer relationships. After graduating from Minnesota State University, Mankato with a degree in Economics, she began her career in banking, helping individuals and businesses finance major life and growth opportunities. In 2010, she joined Snell Motors as Chief Financial Officer and quickly became instrumental in strengthening operations, improving efficiencies, and shaping the company's brand. Her hands-on leadership and willingness to step into any role helped guide the organization through significant growth, leading to her transition to General Manager in 2018 and ownership in 2020.

Today, Snell Companies has grown into a $90 million organization with more than 120 employees and is recognized as one of the top Buick and GMC dealerships in Minnesota. Melissa is a graduate of the National Automobile Dealers Association Dealer Academy and remains actively involved in the industry as a member of the Minnesota Automobile Dealers Association Board of Directors. She is also deeply committed to her community, serving on the Minnesota State University, Mankato

Foundation Board, contributing to major initiatives like Hockey Day Minnesota, and participating in the Federated Insurance National Advisory Council. Her leadership and impact have been recognized with honors including the Minneapolis/St. Paul Business Journal CFO of the Year, YWCA Young Woman of Distinction, and United Way Volunteer of the Year.

Melissa Diegnau

Melissa Diegnau is an Assistant Professor of Management and Entrepreneurship at Minnesota State University, Mankato, where she teaches undergraduate management and online business administration courses. Her research centers on the Scholarship of Teaching and Learning (SoTL), focusing on student success through high-impact learning experiences that integrate industry partners, instructional technology, and real-world application at scale. In addition to her career readiness focused publications, she has been recognized for her teaching and innovation with the Minnesota State System Office “Innovating through COVID-19” Educator Award.

Jenn and Melissa’s connection began in the early 2000s, when Jenn, then a marketing leader, partnered in Melissa’s classroom to support student development through career readiness insights, networking events, and mock interviews. Their shared commitment to student success has grown into friendship and continued collaboration. Jenn continues to bring her energy and real-world perspective into management courses, speaking on topics such as effective communication to help students bridge the gap between classroom learning and the workplace. Given Melissa’s research and teaching focus on integrating industry to enhance career readiness, their partnership today is a natural extension of that work.

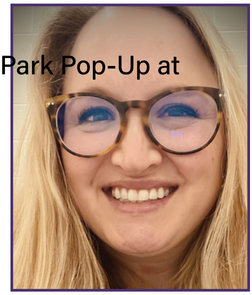
Nathan Faith, CFP™

Nathan has been providing investment advice for clients as an Investment Advisor Representative of Boulay Financial Advisors, LLC since 2010. He specializes in accumulation, distribution and tax planning, and he assists clients within the realm of financial planning to include investment and money management, business succession and exit planning, estate planning, and risk and debt management. By having worked with many clients in different phases of their careers and lives, Nathan has expanded his competencies and is able to flatten the learning curve for his clients by making complex ideas easy to understand. Nathan previously was a member of the Minnesota Army National Guard and was deployed to Iraq with the "Red Bull" brigade in 2006-2007. Nathan is an adjunct professor in the Financial Planning Certificate Program at Minnesota State University, Mankato, where he teaches the Capstone course. He holds a B.S. in Finance with a Financial Planning emphasis from Minnesota State University, Mankato and is a CERTIFIED FINANCIAL PLANNER™ professional. Nathan is a member of the Financial Planning Association and an active member of Faith Lutheran Church in Waconia.

Jenn Faust

Jenn Faust is a Vice President and Treasury Management Officer at Pioneer Bank, where she works with businesses, nonprofits, and community organizations to strengthen financial operations and build confidence in managing money. She is passionate about making banking approachable and practical, with a strong emphasis on financial literacy and helping individuals develop habits that support long-term success.

Abbey Feenstra



Abbey is Program Coordinator of Satellites & Finance Park Pop-Up at Junior Achievement North. Abbey Feenstra works in Satellite Programs and Mobile Experiential Learning with Junior Achievement North, where she supports the development and delivery of dynamic, hands-on educational experiences for students and communities. Her work focuses on bringing Junior Achievement's mission to life beyond traditional classroom settings—removing barriers to access and ensuring learners can engage with meaningful, real-world education wherever they are.

With a strong commitment to innovation and outreach, Abbey helps coordinate programs that promote financial literacy, career readiness, and entrepreneurship using mobile and experiential learning models. She is especially passionate about creating equitable education opportunities and designing programs that are engaging, flexible, and community centered.

Brenda Flannery

Brenda Flannery is a first-generation college graduate who has envisioned, designed, and implemented innovative educational experiences for thousands of students in North America during the past 30 years. Dr. Flannery's doctorate in business administration is from the University of Nebraska-Lincoln, and her MBA and Bachelor of Business are from Western Illinois University. As an experienced higher education leader--including serving as the first female dean of the College of Business at Minnesota State University, Mankato (MSU) for 12 years-- she championed the development of dozens of award-winning student success programs and experiences. She has been recognized by Minneapolis St. Paul Business Journal Women in Business Honoree and Minnesota Monthly Minnesota 500: The Most Powerful Business Leaders in Minnesota. University awards include the Stanger Memorial Women of Influence, Global Citizen Award, Diversity Champion Award, and Student Government Administrator of the Year.

Her teaching, research, and publications on leadership development, experiential learning, and sustainability continue to be Dr. Flannery's passion work with learners of all ages and stages. Research has been published in prestigious journals including the Academy of Management Journal, Journal of Business Ethics, and The Leadership Quarterly. She is a certified Gallup CliftonStrengths coach and serves on the boards of many local non-profits including the Carnegie Art Center, Living Earth Center, Southcentral Minnesota Clean Energy Council, Southern Minnesota Children's Museum, and YWCA Mankato.

Charlie Frazzini

Charlie Frazzini is an Associate Financial Planner at Great River Financial and a 2024 graduate of Minnesota State University, Mankato. He focuses on delivering value through simple, effective financial planning strategies. Charlie passed the CFP exam in November and expects to officially earn the designation this spring.

Haley Geinnotta

Haley Geinnotta is the Director of Regional Programs at Junior Achievement North, where she leads efforts to expand financial literacy, career readiness, and entrepreneurship education across Minnesota, western Wisconsin, North Dakota, and eastern Montana. She works closely with schools, educators, and business volunteers to bring experiential learning into classrooms, helping students build the skills and confidence to lead choice-filled lives.

With a background in education, Haley focuses on supporting teachers, creating meaningful opportunities for students, and connecting classrooms with local businesses to strengthen connections between education and the workforce. She is passionate about expanding access to real-world learning experiences that prepare students to succeed in their futures.

Abdurrahman Guantai, CMEA

Abdurrahman Guantai is Director of Student Access at Minnesota State University, Mankato. He is a higher educational professional with a dedicated focus on Diversity, Equity, & Inclusion (DEI) work. Having completed both his undergraduate studies and his M.S in Educational Leadership at MNSU Mankato, he has been part of the Maverick community for several years. Much of his professional focus is on the retention & recruitment of underrepresented students, with a particular emphasis on first-year students before and during their transition into higher education.

Aiden Hall

Aiden Hall is a senior financial planning student serving as a CFP Liaison and President of the Financial Planning Club. Upon graduation, he'll be joining Bearing Point Capital as an Associate Wealth Advisor.

Daniel Hiebert

Dan Hiebert, PhD, CFP® is a nationally recognized family business succession planning leader. With over twenty-five years' experience as a financial planning practitioner and researcher, Dan is an associate finance professor and Financial Planning Program Director for Minnesota State University-Mankato, as well as the co-director of the Maverick Center for Financial Success at Minnesota State University. In addition, Dan has taught business succession strategy and business Valuation courses at The American College. His co-authored paper was awarded the national 2023 Montgomery-Warschauer Award from the Journal of Financial Planning. This prestigious award recognizes the most outstanding contribution to the betterment of the profession.

Katie Jolicoeur

Katie Jolicoeur, Ph.D., serves as the Director of Career Services at Minnesota State University, Mankato, where she leads initiatives that empower students to develop clarity, confidence, and career readiness. With a professional focus at the intersection of talent strategy and human connection, she works closely with employers, faculty, and campus partners to strengthen pathways from education to meaningful employment. Katie is a NACE Certified Coach and a Gallup Certified CliftonStrengths Coach, integrating strength-based development and evidence informed career practices into the student experience.

Dr. Jolicoeur has contributed extensively to university committees and student success initiatives, including efforts to embed transferable skill development more deeply into academic programs. She has led and supported projects focused on onboarding, leadership development, and curriculum alignment, and she actively advises and mentors student organizations. Katie holds advanced degrees from the University of Nebraska and Western Michigan University, and she is known for her student centered approach, collaborative leadership style, and commitment to helping individuals discover and leverage their potential.

Jason Kley, CFP®, AIF®, MBA

Jason Kley is Vice President and Associate Advisor Group Lead at Sequoia Financial Group. With 20 years of experience in wealth management, Jason specializes in helping individuals navigate the complexities of financial transitions by bridging the gap between technical planning and personal values. As Associate Advisor Group Lead, Jason supports and mentors advisors through coaching, performance guidance, and day-to-day leadership.

In addition to his company leadership, Jason is a prominent voice in financial advocacy and literacy. He has held multiple leadership roles within the Financial Planning Association (FPA), including serving as a past president of the Minnesota chapter and, most recently, serving on the national Board of Directors. He also serves on the Board of Directors for the Minnesota Council on Economic Education. He played an active role in supporting Minnesota legislation requiring personal finance education in high schools. Jason is particularly passionate about behavioral finance—understanding the "why" behind money habits—and frequently speaks to audiences about establishing a healthy relationship with money. A graduate of the University of St. Thomas with an MBA from Washington University in St. Louis, Jason also is a Certified Financial Planner™ professional and an Accredited Investment Fiduciary®. He lives in Eden Prairie with his wife and two sons. Outside of his work, he enjoys spending time with his family, traveling, and outdoor activities.

Ishuan Li Simonson

Ishuan Li Simonson is a Professor of Finance at Minnesota State University, Mankato, and co-director of the Maverick Center for Financial Success. She previously directed the Business Analytics Certificate Program. Professor Li Simonson also served as President, Vice President, and Vice Chair of the Board of Trustees for Omicron Delta Epsilon, the International Honor Society for Economics (2014–2024), as well as Councilor for the Council on Undergraduate Research, Associate Editor for The American Economist, board member for the Minnesota Academy of Sciences, and Peer Reviewer for the Higher Learning Commission. Professor Li Simonson's publications cover topics such as the Marketplace Fairness Act, overeducation and employment mismatch, assessment of college economics programs, and Minnesota's Conservation Reserve Programs. She holds a PhD in Applied Economics from Clemson University.

Iqra Mahamud, CMEA

Iqra Mahamud currently serves as a Student Support Coach within the Center for Multicultural Equity & Access. In that role, she works to support all types of students, with a particular emphasis on first year students. Much of her work revolves around helping students adjust to college life, especially those who are first-generation college students. She has also worked to supervise peer mentors and other student employees who work towards that same goal. She is a MNSU Mankato alum, having completed a bachelor's in business management in 2024. This year, she will complete a master's degree in business administration at MNSU Mankato. Afterwards, she plans to enter the workforce in the field of HR Management.

Katie Mons

Katie Mons is the Director of Minnesota Operations at Junior Achievement North, where she leads efforts to advance the organization's development strategy and expand community impact across the region. She oversees regional fundraising, partnership development, and community engagement, ensuring strong alignment with JA North's overall advancement strategy and organizational priorities.

As an ambassador for JA North, Katie works closely with a local advisory board, donors, and cross-functional internal teams to drive sustainable growth and deepen regional engagement. Guided by a commitment to keeping students at the center of the work, she focuses on helping young people reach their full potential. Through Junior Achievement's programs, students are prepared to become the leaders of tomorrow by building financial literacy, exploring exciting career pathways, and developing an entrepreneurial mindset.

Brooke Nelson

Brooke Nelson is a graduate of Minnesota State University, Mankato, where she earned a bachelor's degree in finance in May 2025 with an emphasis in Financial Planning and Insurance. During her time at the university, she served as President of the Financial Planning Club and worked as a Financial Coach at the Maverick Center for Financial Success. Brooke currently works as an Investment Services Associate with Cetera Investment Services at Community Resource Bank in Northfield. Brooke Nelson is a graduate of Minnesota State University, Mankato, where she earned a bachelor's degree in finance in May 2025 with an emphasis in Financial Planning and Insurance. During her time at the university, she served as President of the Financial Planning Club and worked as a Financial Coach at the Maverick Center for Financial Success.

Brooke currently works as an Investment Services Associate with Cetera Investment Services at Community Resource Bank in Northfield. In this role, she supports the bank's investment department by assisting clients with the selection, establishment, and ongoing servicing of investment and insurance products. She is passionate about helping clients build and manage portfolios that align with their financial goals.

Aidan Ryan

Aidan Ryan is a Financial Advisor at Fortress Financial Group, helping pre-retirees and retirees navigate their financial futures with confidence. He graduated from Minnesota State University, Mankato in 2024 with a degree in financial planning and takes a practical, education-focused approach to guiding clients through important financial decisions.

Rachel Sherlock

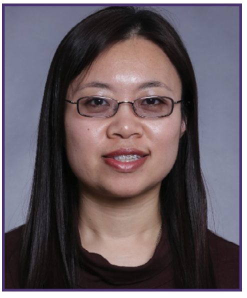
Rachel Sherlock is the Associate Director of Financial Aid for Minnesota State University, Mankato, where she has been working for almost 10 years. In her current role, Rachel oversees financial aid advising and outreach and presents to students, families, and education professionals about money management and how to pay for college. Rachel earned her doctoral degree from St. Cloud State University, where she completed her dissertation research on college emergency grants and retention rates by differing demographic categories. Rachel currently serves as her sector representative for the Minnesota Association for Financial Aid Administrators (MAFAA). Rachel has previously served as both local and state secretary for the Administrative Service Faculty Union (ASF). Outside of work, Rachel lives with her spouse and two dogs, and enjoys volunteering with Vine, teaching fitness classes, and going on lots of travel adventures.

Selene Serkland, CFP®

Selene Serkland is a Senior Director and Wealth Advisor at Sequoia Financial Group, where she specializes in working with clients to develop financial plans that provide clients with long-term security. Her approach to wealth management is deeply personal; having witnessed the impact of economic volatility on her own family during the 2008 recession, she is driven by a mission to ensure her clients never have to wonder if they "have enough." Selene holds the Certified Financial Planner™ designation and is recognized for her ability to translate complex financial planning concepts into actionable strategies that allow clients to achieve their goals.

A graduate of St. Olaf College, Selene was a leader both in and out of the classroom, serving as the president of the college rowing team. Her professional journey began with an internship at a mid-sized wealth management firm in Chicago, which sparked her passion for work in wealth management. Today, she resides in the North Loop neighborhood of Minneapolis. Outside of her professional life, she remains an active member of the Minneapolis Rowing Club, sings in her local church choir, and enjoys spending time at the cabin with family and friends.

Xinyan Shi



Xinyan Shi is a Professor and Chair in the Department of Economics, Marketing, Entrepreneurship, and Analytics at the University of North Carolina at Pembroke. She earned her Ph.D. in Economics from the University of North Carolina at Chapel Hill and has been a faculty member at UNC Pembroke since 2008. Her research expertise spans game theory, financial literacy, economic education, behavioral economics, and public economics.
She has led multi-institutional, interdisciplinary projects focused on health disparities, economic resilience, and financial empowerment for underserved populations, particularly Native American communities. Since 2019, she has secured over $3 million in external funding as a Principal Investigator (PI) or Co-PI, with support from agencies such as Instructional Connections, the National Institutes of Health, the North Carolina Collaboratory, and the Environmental Protection Agency. Her research has been published in economic journals, including the Journal of Housing Economics, International Journal of Economic Theory, Economics Bulletin, Behavioral Public Policy, and Studies in Microeconomics. Currently, she serves as an Associate Editor for The American Economist,

the official publication of Omicron Delta Epsilon, the International Honor Society in Economics.

Mandy Weister

Mandy Weister is an Assistant Professor in the College of Business at Minnesota State University, Mankato and a higher education professional with over 15 years of experience supporting student success across residential life, career development, and the classroom. Her work focuses on connecting academic learning to real-world applications, with an emphasis on career readiness, professional identity development, and creating equitable pathways for students.

In addition to her faculty role, Mandy has extensive experience in career development and experiential learning, collaborating with faculty, employers, and campus partners to support students' long-term success. She holds a Master of Science in Counseling and Student Personnel from Minnesota State University, Mankato and a Bachelor of Arts from Luther College, and is currently pursuing a doctorate in Higher Education Administration at St. Cloud State University.

Josh Wolberg, CFP®, RICP®, MBA

Josh Wolberg is the President and Founder of Great River Financial, where he serves as Lead Financial Planner and Investment Manager. Prior to becoming a financial advisor in 2007, he spent nine years in software development and corporate finance. He also serves as an adjunct instructor at Minnesota State University in Edina, helping financial advisors pursue the CFP designation. A South Dakota native, he lives in Eden Prairie with his wife, Amy, their three children, and a rescue dog, and enjoys staying active, traveling, and exploring ideas that connect money, purpose, and wellbeing.

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