

# NASD Young Employee Investor Education Planning Workshop

October 26 – 28

Nashville, TN

## **Wednesday, October 26**

7:30 AM Continental breakfast in conference room

8:00 AM Welcome and goals for the workshop  
Overview of project  
Schedule of deliverables  
Tasks, issues and questions

11:30 AM Break for lunch

1:00 PM Integration of state plans for programming  
Identification and assessment of curricula  
Methods

## **Thursday, October 27**

7:30 Continental breakfast in conference room

8:00 Marketing, with representatives of Society of Human Resource Managers (SHRM) and target audience  
Marketing messages  
Marketing pieces

11:30 AM Break for lunch

1:00 PM Evaluation, with Joseph Donaldson, Evaluation Specialist, UT Extension

Evening Dinner with Christine Kieffer, NASD

## **Friday, October 28**

7:30 Breakfast in conference room

8:00 Budgets  
Logistics  
Accountability and documentation

Path forward