



Financial Literacy Roundtable's Programming Resource List

Financial Partner	Contact	Phone	Email	Website
AARP - RI	Alan Neville	401-333-0223	abneville@verizon.net	http://states.aarp.org/region/rhode-island/
Amos House	Michelle Pugh	401-272-0220 x207	mpugh@amoshouse.com	http://www.amoshouse.com/TrainingEducation/FinancialOpportunityCenter.aspx
Apella Capital	Sean Flynn	1-860-785-2258	SFlynn@apellacapital.com	http://www.apellacapital.com
Bank of America			call local branch	https://www.bankofamerica.com/
Bank Newport	Meredith Cote		meredith.cote@banknewport.com	https://banknewport.everfi-next.net/welcome/customer
Better Business Bureau	Amy Schram	774-245-8498	aschram@boston.bbb.org	https://www.bbb.org/boston/programs-services/speakersbureau/meet-the-speakers/
Better Business Bureau	Jaime Slatt	508-652-4864	jslatt@boston.bbb.org	https://www.bbb.org/boston/programs-services/speakersbureau/meet-the-speakers/
Bulfinch Group	Caroline Christiano	401-381-0530	carolinechristiano@bulfinchgroup.com	http://bulfinchgroup.com/
Capital Goodfund	Andy Posner; Hillary Feeney	866-584-3651 x105	andy@capitalgoodfund.org ; hillary@capitalgoodfund.org	https://www.capitalgoodfund.org/
Citizens Bank	Patricia Difolco	401-821-7900	patricia.difolco@citizensbank.com	www.citizensbank.com
Collegebound Baby	Dana Peterson-Fatuda	401-462-7640	dpmatuda@treasury.ri.gov	https://www.collegeboundsaver.com/home/ri-outreach.html
Collegebound Saver	Jennifer McElroy	401-632-8953		
Community Action Partnership of Providence		401-273-2000		https://www.cappri.org/
Connecting for Children and Family	Heidi Collins or Zoya Tseytlin	401-766-3384	ZTseytlin@ccfcenter.org	http://ccfcenter.org/workforce_development.html
Consumer Financial Protection Bureau	Dubis Correal	202-435-7937	dubis.correal@cfpb.gov	http://www.consumerfinance.gov/library-resources/
Credit Union Association of RI	Donna Bevilacqua	800-842-1242		https://www.ccu.org/
Crossroads Rhode Island	Leanne Ovalles	401-521-2255 x139	lovalles@crossroadsri.org	http://www.crossroadsri.org/Housing-Services/Education-Employment-Services
Edward Jones	contact local office			https://www.edwardjones.com
EverFi	Dan Weidmann	772-559-1539	dweidmann@everfi.com	https://everfi.com/

Financial Planning Association of RI	Jason Siperstein	401-588-5122	jes@eliotrose.com	http://fpari.org/
Funeral Consumers Alliance of Rhode Island		1-855-697-4347		https://www.funerals-ri.org/
Girl Scouts		401-331-4500	info@gssne.org	www.gssne.org
HarborOne Bank	Claudio Cardozo		ccardozo@harborone.com	https://www.harborone.com/harboroneu
Home Loan Investment Bank	Christine Andrews	1-800-223-1700	candrews@homeloanbank.com	http://www.homeloanbank.com/
Indie Cycle, LLC	Phyllis Hutnak	401-484-8838	phyllis@indiecycle.com	http://indiecycle.blogspot.com/
Junior Achievement RI	Pauline Abetti	401-331-3850	pauline.abetti@ja.org	www.jarhodeisland.org
Local Initiatives Support Cooperation		401-331-0131	rilisc@lisc.org	http://www.rilisc.org
Money Management International		1-800-475-0720 x5830		http://www.moneymanagement.org/Credit-Counseling/Financial-Help/Request-a-Workshop.aspx
National Grid		1-888-633-7947		https://www.nationalgridus.com/RI-Home/Ways-to-Save/
Navigant Credit Union	Randall Sacilotto	401-233-4315	rsacilotto@navigantcu.org	https://www.navigantcu.org/
New England Clean Energy	Mark Durrenberger	978-567-6527	kim@newenglandcleanenergy.com	http://newenglandcleanenergy.com/
New York Life Insurance Company	Bill Geasey	401-841-8989	wgeasey@ft.newyorklife.com	http://www.williamgeasey.com/
Office of the Attorney General of RI		401-274-4400		http://www.riag.ri.gov/
Office of the General Treasurer of RI	Charon L. Rose, Director of	401-222-1353	crose@treasury.ri.gov	http://www.treasury.ri.gov/
Pawtucket Credit Union	Kerri McLaughlin	401-729-5770	kerri.mclaughlin@pcu.org	https://www.pcu.org/community/#/tab/financial-literacy/
Progreso Latino	William Cueto	401-728-5920	wcueto@progresolatino.org	http://www.progresolatino.org/
Province Mortgage		401-490-4400	info@provincemai.com	http://provincemai.com
Providence Promise		401-383-3381	info@pvdpromise.org	https://www.pvdpromise.org/
Providence School of Business		401-865-1000	pcsb@providence.edu	business.providence.edu
Rhode Island Banker's Association		401-276-2637		http://ribankers.com/
Rhode Island Center for Justice and Rhode Island Legal Services,	Eliza Vorenberg	401-254-4597	evorenberg@rwu.edu	
Rhode Island Council for Economic Education	Dr. Margaret Brooks	401-339-4422	ricouncilforeconed@gmail.com	http://rhodeisland.councilforeconed.org/

Rhode Island Housing		401-457-1234	homebuyereducation@rihousing.com	http://www.rhodeislandhousing.org
Rhode Island Resource Recovery	Krystal Noiseux, Education and	401-942-1430		https://www.rirrc.org/education-program-support/presentations-speakers
Rhode Island Small Business Development Corp	Dennis McCarthy	401-874-7232		http://web.uri.edu/risbdc/
Rhode Island State Police Cyber Terrorism Unit				http://risp.ri.gov/community/speaking.php
Rhode Island Student Loan Authority	Bill Bianchi	401-468-1755	wbianchi@risla.com	http://www.risla.com/
RI JumpStart Coalition	Margaret Brooks		rhodeislandjumpstart@gmail.com	http://rijumpstart.org
RILA Financial Literacy Round Table			flrt@rilibraries.org	http://www.rilibraries.org/Money-Smart-Week
RISE		1-800-422-5365	https://www.riseengineering.com/contact	http://www.riseengineering.com/
Roger Williams University College	Pamela Pereira	401-245-3582	ppereira@rwu.edu	https://www.rwu.edu/uc/admissions/visit-uc
Santander Bank		contact local branch		
Shred-it		401-226-0800		https://www.shredit.com/en-us/paper-shredding-providence
SNAP URI Outreach Project	Pamela Jennings, Outreach	401-874-703	pamela_jennings@uri.edu	http://web.uri.edu/endlunger/history/
Sojourner House	Kelly Henry	401-765-3232.	khenry@sojournerri.org	sojournerri.org
United Way of Rhode Island	Natalia Lima	401-444-0631	Natalia.Lima@uwri.org	http://www.uwri.org/
Wealth Management	Contact local offices	401-356-1400		http://www.wealthmanagers.com/
Westerly Credit Union	Kim Gates	401-596-7000 x 2124	kgates@westerlyccu.com	https://www.westerlyccu.com/Save_for_America_71.html
Workplace Partnership of Greater Rhode Island	Nancy Olsen	401-462-8862	nancy.olson@dlt.ri.gov	http://www.griworkforce.com/contactGRI.htm
	Gary Gekow	781-784-9086	gary@resumeyourcareer.com	http://www.resumeyourcareer.com/

Programs Offered

"Life Reimagined" frauds/scams workshops

family income, retirement
retirement planning, college affordability, personal finance

financial literacy
retirement planning, college planning, personal finance

scams, identity theft,

scams, identity theft,

credit, banking needs

VITA, RI home energy assistance, education/training

family budget, education, credit scores, scams & identity theft

Ms. Bevilacqua is the director of community relations. adult

retirement, estate planning, investing, budgeting and more
financial literacy education in high schools

Variety of topics presented by Certified Financial Planners.
500 Greenwich Avenue, Warwick, RI 02886.
small business education, first time homebuyer
first time home buying, basic banking, credit, youth programs
financial literacy education modules for students grades K-12
budgeting, credit, personal finance, webinars
personal finance
solar energy company in Hudson, MA
college financing
scams, identity theft
crime victim compensation fund, unclaimed property
financial literacy, employment
homebuyer education
higher education affordability

homebuyer education
energy audits
college planning
identity theft, personal finance
shred events
hunger in RI and SNAP benefits
retirement, estate and insurance planning, saving for college & life
employment workshops - job search, resume, interview, etc