



Financial Literacy Roundtable's Programming Resource List

Financial Partner	Contact	Phone	Email	Website	Programs Offered
AARP - RI	Alan Neville	401-333-0223	abneville@verizon.net	http://states.aarp.org/region/rhode-island/	"Life Reimagined" frauds/scams workshops
Amos House	Michelle Pugh	401-272-0220 x207	mpugh@amoshouse.com	http://www.amoshouse.com/TrainingEducation/FinancialOpportunityCenter.aspx	family income, retirement
Apella Capital	Sean Flynn	1-860-785-2258	SFlynn@apellacapital.com	http://www.apellacapital.com	retirement planning, college affordability, personal finance
Asset Strategy Advisors	Kate Zimmerman	1-781-235-4426	Kaz@assetstrategyrc.com	https://www.assetstrategyrc.com/kaz/	
Bank of America			call local branch	https://www.bankofamerica.com/	financial literacy
Better Business Bureau	Amy Schram	774-245-8498	aschram@boston.bbb.org	https://www.bbb.org/boston/programs-services/speakersbureau/meet-the-speakers/	scams, identity theft,
Better Business Bureau	Jaime Slatt	508-652-4864	jslatt@boston.bbb.org	https://www.bbb.org/boston/programs-services/speakersbureau/meet-the-speakers/	scams, identity theft,
Bulfinch Group	Caroline Christiano	401-381-0530	carolinechristiano@bulfinchgroup.com	http://bulfinchgroup.com/	
Capital Goodfund	Andy Posner	866-584-3651 x105	andy@capitalgoodfund.org	https://www.capitalgoodfund.org/	
Citizens Bank	Patricia Difolco	401-821-7900	patricia.difolco@citizensbank.com	www.citizensbank.com	credit, banking needs
CollegeboundSaver	Dana Peterson-Fatuda	401-462-7640	dpfatuda@treasury.ri.gov	https://www.collegeboundsaver.com/home/ri-outreach.html	
Community Action Partnership of Providence		401-273-2000		https://www.cappri.org/	VITA, RI home energy assistance, education/training
Connecting for Children and Family	Heidi Collins or Zoya Tseytlin	401-766-3384	ZTseytlin@ccfcenter.org	http://ccfcenter.org/workforce_development.html	family budget, education, credit scores, scams & identity theft
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 M. Bevilacqua	800-842-1242	dbevilacqua@cucenter.org	www.cuassociationri.org	Ms. Bevilacqua is the director of community relations. adult
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	retirement, estate planning, investing, budgeting and more
EverFi	Luke Martin	772-559-1539	lmartin@everfi.com	https://everfi.com/	financial literacy education in high schools
Financial Planning Assoc. of RI	Jason Siperstein	401-588-5122	jes@eliotrose.com	http://fpari.org/	Variety of topics presented by Ceritified Finanical Planners. Contact Mr. Siperstein directly.
Girl Scouts		401-331-4500	info@gssne.org	www.gssne.org	500 Greenwich Avenue, Warwick, RI 02886.
Home Loan Investment Bank	Christine Andrews	1-800-223-1700	candrews@homeloanbank.com	http://www.homeloanbank.com/	first time home buying, basic banking, credit, youth programs
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	financial literacy education modules for students grades K-12
Local Initiatives Support Cooperation	Mary Fasano	401-331-0131	MFasano@lisc.org	http://www.rilisc.org	
Money Management International	Scott Sullivan	1-800-475-0720 x5830	scott.sullivan@moneymanagement.org	http://www.moneymanagement.org/Credit-Counseling/Financial-Help/Request-a-Workshop.aspx	budgeting, credit, personal finance
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/	personal finance
New England Clean Energy	Mark Durrenberger	978-567-6527	kim@newenglandcleanenergy.com	http://newenglandcleanenergy.com/	solar energy company in Hudson, MA
New York Life Insurance Company	Bill Geasey	401-841-8989	wgeasey@ft.newyorklife.com	http://www.williamgeasey.com/	college financing
Office of the Attorney General of RI		401-274-4400		http://www.riag.ri.gov/	scams, identity theft
Office of the General Treasurer of RI	Charon L. Rose, Director of	401-222-1353	crose@treasury.ri.gov	http://www.treasury.ri.gov/	crime victim compensation fund, unclaimed property
Organizing in RI, LLC	Kristin MacRae	401-323-1165	kristin@organizinginri.com	http://www.organizinginri.com/	organizing life - workspace, home, closets; taming paper clutter
Pawtucket Credit Union	Kerri McLaughlin	401-729-5770	Kerri.McLaughlin@pcu.org	https://www.pcu.org/community/#/tab/financial-literacy/	Budget, credit scores, scams & identity theft, financial wellbeing.
Progreso Latino	William Cueto	401-728-5920	wcueto@progresolatino.org	http://www.progresolatino.org/	financial literacy, employment
Province Mortgage		401-490-4400	info@provincemai.com	http://provincemai.com	homebuyer education
Providence Promise		401-383-3381	info@pvdpromise.org	https://www.pvdpromise.org/	higher education affordability
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	homebuyer education
Rhode Island Resource Recovery	Krystal Noiseux, Education and	401-942-1430	Tours@rirrc.org	http://www.rirrc.org/school/school-visits-and-presentations/	
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/	energy audits
Santander Bank		contact local branch			identity theft, personal finance
Shred-it		401-226-0800		https://www.shredit.com/en-us/paper-shredding-providence	shred events
SNAP URI Outreach Project	Pamela Jennings, Outreach	401-874-703	pamela_jennings@uri.edu	http://web.uri.edu/endlhunger/history/	hunger in RI and SNAP benefits
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/	retirement, estate and insurance planning, saving for college & life
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/	employment workshops - job search, resume, interview, etc