FOR IMMEDIATE RELEASE

UCI’s Business School Kicks Off Financial Literacy Summer Residential Program

8th and 9th Grade Boys Learn How to Build a Meaningful Life Plan by Creating Lasting Financial and Educational Goals

Irvine, CA – (August 5, 2014) – Check-in for the 4th annual Financial Literacy Summer Residential Program, hosted by the Center for Investment and Wealth Management (CIWM) at UC Irvine’s Paul Merage School of Business, will begin Sunday, August 10th for 30, very deserving 8th and 9th grade boys. The week-long program, held on the UCI campus, will run through August 16th.

“The primary purpose of our Financial Literacy program is to provide a foundation of financial knowledge, while creating an enjoyable environment and summer experience for underprivileged students from the surrounding area,” said Lee Anne Maki, associate director for the CIWM. "Our ultimate goal is to endow the Financial Literacy Summer Residential so that we may concentrate on increasing the number of students we can positively affect each year.”

The Merage School’s Financial Literacy program offers students a taste of the college experience by rooming in the dorms on UCI’s campus for an entire week. They also take part in a vibrant, all-encompassing educational experience that teaches them about financial literacy and how to prepare for success in college and in their future careers.

Included in the 2014 program curriculum is a session on preparing a personal budget, a “Poised for Success” field trip at Men 2 Work, and a social etiquette dinner hosted by Payden and Rygel.
Students also get the opportunity to visit Taco Bell headquarters and Pacific Investment Management Company’s (PIMCO) trading floor. Afterward, they prepare and give their own “life plan” presentation to a panel of adult, volunteer professional judges.

In addition, this year students will enjoy special presentations by Fidelity National executive, Ryan Bailey, a UCI alumnus and four-time Olympian in water polo; Chris Rudolph, a UCI alumnus and vice president of Operations and Quality at Boeing; and Wing Lam, co-founder of Wahoo’s Fish Taco.

The week-long residential will culminate in a graduation ceremony to be held Saturday, August 16th and will feature keynote speaker, Thomas A. Parham, PhD, vice chancellor of UCI Student Affairs.

Established in 2011 by Mark Moehlman, managing director for Beacon Pointe Wealth Advisors and founding chair of the CIWM at the Merage School, the Financial Literacy Summer Residential was designed to instill a strong desire for understanding financial matters, encourage admission into a four-year college or university, and inspire confidence and success in all areas of life. Each year, potential candidates for the program are identified by partner organizations including Big Brothers/Big Sisters, El Viento, El Sol, Kidworks, Operation Jump Start, Project Hope, Wooden Floor, Love Beyond Limits, and the Santa Ana Unified School District.

“There is much that can be accomplished when the mission and the inspiration is clear,” said Andy Policano, faculty director of the CIWM. “Our School takes pride in its mission to enhance socially responsible growth and to offer a highly personalized environment, whether that is to our students or to our community. I am glad this innovative program has found its way onto our campus, and into our hearts.”

Sponsors for the 2014 Financial Literacy Summer Residential include Allergan, Arbonne Charitable Foundation, Beacon Pointe Wealth Advisors, Beacon Pointe Advisors, Boeing, Mary Broude, Charles Schwab Foundation, Duckworth Wealth Advisors, JP Morgan, Orange County Printing Company, Payden and Rygel, Pimco Foundation, PricewaterhouseCoopers, Rebella Accountancy, Richard Schwegpe Family, Schriber Family Foundation, Taco Bell, UCI Alumni

For companies and individuals who wish to get involved or help sponsor a student contact Lee Anne Maki at lmaki@uci.edu or call 949.824.2675. To learn more about the program, visit: ciwmfinancialliteracy.com.

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