

## **Co-Director's Report: 2026 Annual Conference on Financial Wellness**

Maverick Center for Financial Success  
Minnesota State University, Mankato

### **Introduction**

The Maverick Center for Financial Success (MCFS) at Minnesota State University, Mankato, serves as the premier hub for training the next generation of financial professionals and providing financial wellness education to the broader community. Established in fall 2023 with seed funding from the Schwab Foundation, MCFS empowers students, alumni, and community members with practical knowledge in personal finance, career readiness, and wealth-building strategies.

The 2026 Maverick Conference for Financial Wellness built upon the success of our inaugural 2025 event, expanding reach, engagement, and participant satisfaction while strengthening partnerships across the university and with industry leaders. As Co-Director of MCFS and Chair of the conference held on April 17, 2026, I am pleased to present this report summarizing the event's outcomes, attendance, programming, and impact.

I extend my deepest gratitude to the Schwab Foundation for its continued support as our primary funder, and to Dr. Seung Bach, the Dean of the College of Business, for his encouragement and shared belief in the mission of the Center. Special thanks to our two conference sponsors, MavFund and the Financial Planning Program. I also thank the dedicated Steering and Organizing Committee members (Samantha Campa, Shane Bowyer, Brenda Flannery, Jae Min Lee, Mandy Weister, Daniel Hiebert, Rachel Sherlock, Aiden Hall, Michael Lawrence, Maya Nelson, and Gwenn Wolters) for their tireless planning, promotion, and on-site execution. Finally, heartfelt appreciation goes to the 12 faculty members who encouraged student participation in their courses: Brenda Flannery, Robert Simonson, Cheryl Trahms, Daniel Moen, Nguyen Nguyen, Joseph Reising, Sean Fingland, Shane Bowyer, Melissa Diegnau, Mandy Weister, Daniel Hiebert, and Yuhao Chen. Their collaboration was instrumental in achieving record attendance.

### **Attendance and Demographics**

The 2026 conference achieved significant growth compared to the 2025 inaugural event (180 registrations). This year, we recorded 297 registrations (65% increase). Of these, 228 identified primarily as students (77%), with additional participation from faculty (21), industry professionals (12+), staff, alumni, and community members.

College of Business students showed strong representation among attendees. Among them, Finance (68, 31%), Business Analytics (30, 14%), Management (27, 12%), Accounting (25, 11%), Marketing & Other Business (71, 32%). School-year distribution was balanced across sophomores, juniors, and seniors, with broad representation from multiple colleges beyond Business (e.g., Education, Allied Health, Engineering, Humanities and Social Sciences). This diversity underscores the broad appeal of financial wellness education. Compared to 2025's primarily business-focused audience, 2026 successfully expanded interdisciplinary reach while maintaining core finance/management strength.

### **Vendors and Exhibitors**

The conference featured strong industry participation with 17 vendors and exhibitors representing financial services, wealth management, banking, insurance, and community organizations. It represents an increase of 50% in tabling presence. Many of the participants also facilitated sessions and participated as panelists in the Financial Planner/Student Networking Event. Among them, Junior Achievement North, Charles Schwab ([schwab.com](https://www.schwab.com)), Sequoia Financial ([sequoia-financial.com](https://www.sequoia-financial.com)),

Northwestern Mutual (nm.com), Bond & Devick (bondanddevick.com), Boulay (boulaygroup.com), Bank Vista (bankvista.com), Pioneer Bank (bankwithpioneer.com), Wealth Centers (wealth-centers.com), Berger Financial Group (bergerfinancialgroup.com), Snell Motors (snellmotors.com), the SCG (thescg.com), MavFund, Financial Planning Program, Center for Innovation and Entrepreneurship (Gateway Center), Stacking Benjamins, Master in Business Administration Program, Mankato Area Foundation (mankatoareafoundation.com), and Future Leaders Academy.

This diverse lineup provided students with excellent networking, tabling, and practical insights, which significantly contributed to the conference's success.

### **Program Highlights and Session Ratings**

The conference featured a robust lineup of fourteen sessions including the Keynote Address (Dr. Kumar Balasubrahmanyam), SPARKTalks series, Financial Planning Career Panel, "Why We Buy: Psychology of Spending," Work Benefits session, Salary Negotiation workshop, Bank Smarter, Build Your PH&D, specialized tracks on student loans, post-college planning, and first-gen financial literacy. The program was designed to deliver practical, actionable content aligned with MCFS's mission.

The feedback was exceptionally strong. The Keynote received 118 responses: 38 "Most Interesting/Most Useful" (32%) and 71 "Interesting/Useful" (60%), for a combined 92% positive rating. Aggregated across all sessions (keynote, SPARKTalks, "Why We Buy," Leading with Purpose, Build Your PH&D, Work Benefits, Financial Planning Panel, and Post-College Factors, the vast majority of ratings were 4–5 on a 5-point scale, with minimal neutral or negative responses. Qualitative comments praised the speaker's passion, relevance, and networking value.

A small-sample post-conference survey (n=23) echoed these findings: 64% rated overall organization "Excellent," 32% "Good"; 64% found sessions "Very relevant"; and 82% were "Likely" or "Very Likely" to recommend the conference. Most beneficial sessions cited included the Keynote, Salary Negotiation, and SPARKTalks.

### **Conclusion and Recommendations**

The 2026 MCFS Annual Conference was a success. It met most of the goals it set for the conference: nearly doubled 2025 registration and attendance while maintaining exceptional quality and satisfaction. It increased the diversity of vendors and exhibitors, while delivering 14 sessions and workshops. It effectively advanced MCFS's mission by promoting financial wellness, career-ready financial skills, and fostering industry connections. The strong faculty partnership model (12 instructors) and active vendor engagement proved highly effective.

Recommendations for 2027: (1) Expand capacity for high-demand sessions (Keynote, Salary Negotiation, Financial Career Panel, SPARKTalks); (2) Continue and formalize faculty partnerships; (3) Address minor AV/logistics feedback; (4) Broaden outreach to non-business majors while preserving the finance core.

It has been an honor to serve as Conference Chair and Co-Director. I look forward to building on this year's achievements.

Respectfully submitted,

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