

# California's Early Wealth Account System Summit: PATHWAYS TO PROMISE

April 9, 2025 | 8 AM | The Sofia 2700 CAPITOL AVE, SACRAMENTO

## Agenda

8:00 - 9:00 AM

**Registration & Networking**  
**Lobby & Gallery A**

9:00 - 9:40 AM

**Welcome & Opening Remarks by  
State Treasurer Fiona Ma, CPA**  
**Sutter Theatre**

9:40 - 10:40 AM

**Plenary Session**  
**Sutter Theatre**

***Advancing Early Wealth-Building for California's  
Youth: A Plan Sponsored by BlackRock  
Foundation***

California has long been a leader in early wealth-building, with a strong network of locally operated Child Savings Account (CSA) programs, the nation's largest state-run CSA initiative, CalKIDS, and the HOPE program launching next year. This plenary will preview The California Early Wealth Accounts System (CEWAS) Plan. Our goal is to align public, philanthropic and nonprofit leaders around strategies to expand awareness, access and engagement in CalKIDS, local CSA programs and HOPE Accounts—ensuring that young Californians, especially those in under-resourced communities, fully benefit from all of the wealth-building opportunities available to them.

10:40 - 10:50 AM

**Break**

10:50 - 11:50 AM

**Breakout Sessions**

- **Session 1 Sutter Theatre**  
***Leveraging Public & Administrative Policy  
to Advance Early Wealth Accounts***

This session will explore strategies to advance policies supporting early wealth accounts at the national, state and

public agency levels. Participants will gain insights into the policy landscape, how state-level early wealth initiatives such as California's influence national progress, and explore policy opportunities - budgetary, legislative and administrative - to strengthen early wealth initiatives. A panel discussion with policymakers, policy advisors and public agency administrators will be followed by an interactive discussion to identify and prioritize policy goals for California.

- **Session 2 Voris Theatre**

***Building Bridges: Creating Community Partnerships to Expand Early Wealth Accounts in California***

This session will explore strategies for fostering strong community partnerships to expand the reach and impact of early wealth account programs in California. It will cover best practices for collaborating with local organizations, K-12, financial institutions, higher education schools and community leaders to increase accessibility and awareness. The discussion will highlight successful case studies and provide insights into effective partnership development, ensuring more families can benefit from wealth-building initiatives.

**11:50 AM – 12:40 PM**

**Lunch & Networking**

**12:40 - 1:25 PM**

**A Keynote by Dr. Willie Elliott**

**Sutter Theatre**

Dr. Willie Elliot, a leading expert in children's savings accounts (CSAs) from Michigan State University, will discuss the national landscape of CSAs. He will provide insights into current developments in the space, highlight emerging trends, and discuss key challenges that may shape the future of CSAs in the coming years. Dr. Elliot's research and expertise in asset building and educational outcomes will offer valuable context and strategic guidance for advancing CSA programs and expanding economic opportunities for children nationwide.

**1:25 - 2:10 PM**

**Plenary Session**

**Sutter Theatre**

***UCLA CalKIDS Institute: Early Lessons Learned from CalKIDS Research***

*In this session, the UCLA CalKIDS Institute presents analyses of statewide CalKIDS claim data and perspectives of current postsecondary students who are among the first students to use the funds from their CalKIDS accounts. We then focus on the experiences of Riverside County of Education (RCOE); the county office of education that has achieved a higher rate of CalKIDS uptake (i.e., the percentage of accounts claimed). We delve into the history and evolution of efforts by RCOE to promote interest in and aspirations toward post-secondary education, with a particular emphasis on financial capacity and asset building, to see how their efforts have led to this high rate of account claims. Through this example, we offer promising practices for educators, schools, districts, and county offices that support asset equity.*

**2:10 - 2:20 PM**

**Break**

**2:20 - 3:20 PM**

**Breakout Sessions**

- **Session 1 Sutter Theatre**

***Unlocking Opportunity: Integrating CalKIDS into Public School Systems***

Panelists will discuss effective engagement strategies for reaching historically marginalized communities, best practices for integrating CalKIDS into existing academic standards, and the role of student-led initiatives in promoting financial empowerment. Additionally, we will examine how public schools (TK-12) and community organizations can collaborate to expand the program's reach and impact. Attendees will leave with concrete action steps to advocate for CalKIDS in their schools and communities, integrate it into district strategic plans, and leverage available resources to support educators and administrators in implementation. Don't miss this opportunity to champion financial equity and college access for all students!

- **Session 2 Voris Theatre**

***Marketing that Moves: Strategies to Engage, Educate, and Activate***

This breakout session will explore effective marketing and communication strategies to increase engagement with early wealth accounts. Through interactive discussions and case studies featuring local programs alongside state-wide initiatives, participants will gain insights into strategies that leverage philanthropy, pilot innovative approaches, and apply tested frameworks to experiential design.

**3:20 - 3:25 PM**

**Break**

**3:25 - 4:30 PM**

**Final Remarks & Call to Action**

**Sutter Theatre**