Regions Midwest Team

Government Banker

Heidi Leonard
Government Banker
317.221.6014
heidi.leonard@regions.com

Financial Wellness

Sarah Young
Financial Wellness Relationship Manager
317.498.9742
Sarah.young@regions.com

Financial Wellness

Kariene Fortner
Regional Team Manager
251.423.6876
Kariene.fortner@regions.com

Financial Wellness

Megan Rector
Financial Wellness Relationship Manager
618.708.2689
Megan.rector@regions.com
Corporate Snapshot

- Founded in 1856. Headquartered in Birmingham, Alabama
- Ranks Among Top 25 U.S. Banks by Total Consolidated Assets ($128Bn) with 4.8 million customers
- Average $81 billion in loans and $94 billion in total deposits
- Over 20,000 employees
- 15-state footprint, 1,450 branches, almost 2,000 ATMs across the Midwest, South and Texas
- Regions serves over 2,300 government and institutional entities, including 150 colleges and 200 school districts. The portfolio totals more than $6.5 billion in deposits and $6.2 billion in loans.
- 100 Government & Institutional Relationships
WHY FINANCIAL EDUCATION

Did you know personal financial issues are the No. 1 cause of workplace stress among employees? According to research by Harris Interactive, employees with high levels of stress from debt are more likely to experience anxiety and other potential health concerns.

College Students are the least prepared to manage their finances.
DIGITAL STRATEGY- FINANCIAL LITERACY

Regions Next Step Seminars provide your Students with tools, solutions and action-oriented handouts to help them start focusing less on their finances and more on furthering their careers and enjoying life.

Financial Education Resources for Students
https://www.regions.com/nextstepforstudents
- Customized Financial Education Curriculum
- Podcasts for Students
- Next Step Budgeting Tools, Resources & Calculators
- Downloadable Worksheets
- Next Step Insights for Students

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REGIONS.COM/NEXT-STEP

FINANCIAL WELLNESS TOOLS

PODCASTS

NEXT STEP WEBINARS

EVER-FI FINANCIAL LEARNING CENTER

NEXT STEP INSIGHTS FOR STUDENTS
FINANCIAL EDUCATION PARTNERSHIPS

McKendree University
Audience – All new Freshman Students
Contact – New student admissions

Maryville University
Audience – Alumni
Contact – Director of Alumni Services

Edwardsville University
Audience – Small Businesses of Illinois
Contact – Director Small Business Development Center

Richland Community College
Audience – Workforce Development Program
Contact – Workforce Development Director

REGIONS COLLEGIATE PARTNERSHIPS:
- Over 100 participating schools
- 75 Virtual Programs
- 5K Participants since August 2020
FINANCIAL EDUCATION PARTNERSHIP

HEARTLAND COMMUNITY COLLEGE

Student Program
Jennifer Vieley
Director of First Year Education

Employee Program
Hannah Renner
Coordinator of Employee Development and Training
FINANCIAL WELLNESS PROGRAMS
DEVELOPING A PROGRAM

EXPERIENCE
✓ Attend a Financial Education Class

ENGAGE
✓ Be a Champion for Financial Literacy
✓ Formulate Your Team

DEFINE
✓ Set Your Goals for Program Outcomes
✓ How do you want to execute your plan?

RESEARCH
✓ Who can your partner with?