

Dear Friends,

I hope this message finds you all doing very well.

We should be very excited about the work that the San Francisco Bay Area Chapter of the Urban Financial Services coalition (UFSC) completed in 2006.

I am reminded of the experience of the Honorable Barbara Lee - United States Congress, who at one time was a welfare mom ([click here for her story](#)). Congressperson Lee has gone from welfare mom to employee to manager to leader and visionary.

In 2006, we saw some other POTENTIAL "Barbara Lee's" and the UFSC gave them positive support and access.

Here are some of the 2006 UFSC highlights;

November & December

-Our chapter recognized that while the effects of hurricane Katrina are not on the top of everyone's minds right now, there are still many families in the Bay Area who were wiped out and displaced by the Katrina disaster. Whether we think about it or not, for some those families the holiday season was also a disaster. Our chapter members provided food and gifts for target families who were not going to have anything significant for their holiday. Going into the family apartments in November and December was very sobering, but what a joy to be able to make a difference in bringing things like pajamas in size 3T to books to turkeys! Many thanks to Julia Brown, Esq. - Vice President- Charles Schwab Bank, who headed this up, along with Chamaine Woffard- Manager- Wells Fargo Bank, Dawnn Hills- Manager-Ameriprise Financial, Marjorie Grace- Principal- Grace Financial Services, Damita Barbee - Vice President - Countrywide Bank, Pat Scates- Vice President- Wells Fargo Bank and Otis Watson- Vice President- Comerica Bank.

-Management Committee 2007 planning retreat held at the Faculty Club University of California at Berkeley.

October

-We had a fine general business meeting in October -Presentation by Mr. Frank Abraham, EVP Bank of America - "The changing environment for Financial Professionals of Color and how to continue to grow, contribute and be successful" -a very challenging, revealing and forward thinking discussion. We had so much feedback from the audience, we went overtime and had to eventually cut off questions and comments. Our thanks to Anna Ollison- Manager- Union Bank of California for

hosting meeting at 400 California St., San Francisco, Ca. and Mr. Robert Daniels III for planning support.

-We opened discussions with two other groups in San Francisco and the South Bay to conduct Community Youth Financial Literacy workshops.

-We opened discussions with a number of University of California at Berkeley and St. Marys' College in Moraga to look at collaboration possibilities in our Professional Development Program and Community Youth Financial Literacy Program.

September

-Fantastic General Business Meeting September - Presentation by Mr. Roger Lewis- Human Resources Compensation Manager, Genetech "What do you know about compensation?" This was an enlightening presentation covering -Defining total compensation in all its forms, doing a self-audit of our own organizations' footing, socialization tactics/style and where we stand. We had a large amount of useful discussion and feedback in that meeting. Our thanks to Henry Williams- Vice President - Comerica Bank for hosting meeting at One Embarcadero Center, San Francisco, Ca.

August

-The Joint Organizations Picnic - Lake Chabot Park, Castro Valley- people from UFSC, Wells Fargo Bank, Charles Schwab Bank and other companies enjoyed good food, industry discussion, networking, and relaxing together.

July

-Meeting of Chapter Membership Committee in Burlingame, Ca.-Thanks to Chairman Robert Daniels III for facilitating this meeting.

-Two Youth Financial Literacy Workshop collaboration projects- One in Oakland March 2006 and one in San Francisco July 2006. Over 90 youth participated. Fun week-long sessions covering credit, budgeting, investing, entrepreneurship. Check out the photos on our website. [Click here.](#)

May

-It was my pleasure to attend the National Urban Financial Services Coalition

Conference in Dallas - it was amazing! Excellent information in the areas of professional personal development and organizational best practices were discussed. In addition, two new college student chapters were admitted! Delegates attended from across the US, Canada and the Caribbean.

April

-The April Mixer at the African American Museum and Library at Oakland- It was a pleasure to witness Entry level Analysts and Tellers networking with Senior Vice Presidents and Company CEOs- it's not often they cross paths. Persons from various segments of financial services -Banking, Securities and Insurance exchanging ideas and phone numbers, Powerful.

In conclusion, our November Management Committee Retreat yielded some very powerful ideas and plans for 2007. Whether you are an entry level professional or a Company President, we believe we have something that will be very exciting for you in 2007. If you are not a member, contact us thru our website to get involved and benefit!

In search of more "Barbara Lees" in myself and others...

Walter Brown, Jr. DE
SF Bay Area Chapter Chairperson UFSC
www.ufscnet-sf.org