



To: Ore Phillips
From: Kathleen McDowell
Subject: Credit Cards 101 Training Course
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Director – Advisory Payments

This memo is written to document Ore Phillip's participation in leading the development of a Credit Card 101 Training Course.

- Ore was proactive in reaching out to the payments people team to find ways to assist in the development payments training materials. He required very little direction from me, other than what are overall objectives were.
- He connected with me early on and volunteered to assist with the credit payments training in a project manager role (in addition to developing content). He has done a great job leading the initiative including, finding the relevant resources to assist in content development and developing a project plan
- In this role he has:
 - Pulled together a team consisting of himself, a manager, and another senior to develop the training
 - Set up working session and status calls
 - Developed a project plan and worked with the Payments COI and training to determine a mutually agreeable time for the training
 - Developed an initial outline for the training which will be used as a basis for creating the training content. The initial outline was well structured, including all essential elements in previous similar trainings, as well as adding new topics that have been in the headlines recently

I appreciate that Ore took the time to think beyond the standard request, incorporating new and timely additions to the training to deliver the best output.

I expect Ore to be an integral part of developing this training and expect a successful delivery of this training to the FS community in the mid-June timeframe.

Regards,
Kathleen McDowell
Director, Advisory