

Congratulations to Pentegra's Kate Blake Winner, 2016 WestFair Communications' "Milli" Award

What She Does at Pentegra:

In her role as an Education Consultant at Pentegra, Kate develops and leads educational seminars designed to provide plan participants with the knowledge they need to make smart retirement saving and investment decisions. She's all about helping people create accumulation and decumulation strategies for retirement that are in line with today's best practices.

Recognizing that many Millennials are the first digital natives, Kate embraces technology and integrates it into her approach to financial education. With live and on-demand webinars, online quizzes and handouts, and links to educational internet resources, Kate encourages members of all generations to recognize that we live in a time where we have the tools for success available at our fingertips. By providing targeted content to the different demographic groups in today's workforce, Kate encourages Millennials, Gen-X'ers and Boomers alike to use their strengths to help develop financial literacy.

On a typical day, you might find her traveling the tri-state area to lead a meeting, or working on a curriculum for a new presentation. Year-to-date, she has met with hundreds of employees at nearly twenty financial institutions in the Tri-State area, and more nationwide or via webinar.

Qualities that Make Her Unique Among Millennials

"Use it up, wear it out, make do or do without" was the slogan in Kate's childhood home. Raised by her grandmother, who was a child of The Great Depression, Kate's upbringing was quite unlike that of other Millennials. In a reversal of roles, Kate is now the caregiver for her grandmother. This has provided her with a unique firsthand view of the cause and effect between early financial behaviors and their retirement outcomes.

From the perspective of a Millennial, she encourages her peers to take a long view, and take advantage of the time value of money. From the perspective of someone who has already had to navigate firsthand the nuances of distributions, tax implications, Social Security and Medicare, she is able to assist older generations in achieving their financial literacy goals with a perspective that is unusual for a member of the younger generation. These experiences allow her to bridge the gap and encourage the generations to help each other, and work together to share experiences, ideas, and goals.

Passions, Interest and Involvement

Kate is an active member of ASPPA, the American Society for Pension Professionals and Actuaries, and holds her CPC (Certified Pension Consultant), QPA (Qualified Pension Administrator) and QKA (Qualified 401(k) Administrator) credentials. She served as the team leader for the 2016 QPA educational curriculum development and review process.

Outside of work, Kate can usually be found outside either hiking or working in her garden. The Appalachian Trail and hikes of the Catskills and Hudson Highlands are Kate's home base on the weekends, although she recently summited Mount Marcy, the highest peak in New York State, with an elevation of 5344'. In her garden, it's easy to see the generational influence – with almost two dozen varieties of heirloom fruits and vegetables, she is proud to have a Victory Garden for the new millennium!

