

The Office of the Comptroller of the Currency's (OCC) **Financial Literacy Update** is a bimonthly e-newsletter that reports upcoming events, new initiatives, and related resources of the OCC and other government agencies and organizations. The **Financial Literacy Update** provides brief descriptions for upcoming events in chronological order. New initiatives and resources are listed in alphabetical order. Visit www.occ.gov/flu for more information. We welcome your feedback.

The information in the *Financial Literacy Update* was obtained from publicly available sources. Inclusion of a non-OCC event, activity, product, or hyperlink in this newsletter does not constitute an endorsement by the OCC. The OCC does not exercise editorial control over any of the information you may find when linking to non-OCC websites and cannot guarantee the accuracy of the information.

[□Events](#) [□Initiatives](#) [□Resources](#)

EVENTS

[Military Consumer Month](#)

July 2019 (Nationwide)

The Federal Trade Commission, the U.S. Department of Defense, and the Consumer Financial Protection Bureau and their military consumer partners on the Military Consumer initiative share tips and resources with service members and their families to help them manage money, deal with debt, and avoid scams.

[Financial Coaching Fundamentals and](#)

[Specialty Training on the Web](#)

July–August 2019 (Online)

Change Machine offers regularly scheduled web-based training on financial coaching. The presentations cover financial security fundamentals and specialized topics.

[Next Gen Personal Finance Webinars](#)

July–August 2019 (Online)

Next Gen Personal Finance offers these one-day, professional development workshops for personal finance educators.

[Teacher Workshops in Southeastern U.S.](#)

July–August 2019 (Various Locations)

The Federal Reserve Bank of Atlanta sponsors teacher workshops and events in Alabama, Florida, Georgia, Louisiana, Mississippi, and Tennessee. These events cover a variety of financial capability and economics topics.

[Keys to Financial Success](#)

July 8–12, 2019 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia sponsors this five-day professional development program acquainting high school educators with the Keys to Financial Success.

[2019 Higher Education Financial Wellness Summit](#)

July 14–16, 2019 (Bloomington, Ind.)

The Higher Education Financial Wellness Advisory Committee, in conjunction with Indiana University, sponsors this summit, which provides a venue for institutions associated with higher education to learn and share information vital to a successful financial wellness program.

[Economic Summit 2019](#)

July 18, 2019 (San Antonio, Texas)

The Federal Reserve Bank of Dallas sponsors this workshop to help educators bring current economic events into the classroom.

[Making Sense of Money and Banking](#)

July 22–26, 2019 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia sponsors this five-day professional development program, which covers money, banking, and the Federal Reserve System. The emphasis is on active- and collaborative-learning teaching methods and curriculums for teaching money and banking in the K–12 classroom.

[Coaching Essentials](#)

August 8 and 22, 2019 (Nationwide)

The AFCPE hosts this webinar to provide participants with the skills and techniques to build on their financial foundations and support clients as they make lasting financial behavior change.

[Association of Military Banks of America](#)

[Annual Meeting](#)

August 25–28, 2019 (Palm Beach, Fla.)

This annual meeting celebrates its 60th anniversary of supporting the military community.

[Common Cents Conference](#)

September 17–18, 2017 (Fairfax, Va.)

The Common Cents Conference addresses the financial issues facing the residents of Maryland, Virginia, and Washington, D.C. Attendees learn about innovative program models to help residents achieve their financial dreams.

[World Investor Week](#)

October 1–7, 2019 (Global)

World Investor Week is a global campaign to raise awareness about the importance of investor education and protection. It is an initiative of the International Organization of Securities Commissions. Securities regulators and other organization members across six continents will conduct outreach activities. The U.S. Securities and Exchange Commission is the lead U.S. agency for this global effort.

[Annual Financial Literacy & Economic Education Conference](#)

October 4–5, 2019 (Los Angeles)

The Council for Economic Education hosts this event for K–12 educators. Conference sessions and workshops provide actionable tactics to help incorporate economics and financial literacy in classes.

[Financial Literacy Conference in Arlington, Va.](#)

October 7–8, 2019 (Arlington, Va.)

The Society for Financial Education and Professional Development hosts the 12th Annual Financial Literacy Leadership Conference, “Financial Literacy Applications.” Participants will receive information and strategies on how financial literacy is being applied to improve the financial well-being of individuals and families.

[Credit as an Asset](#)

November 12, 2019 (Detroit)

The Credit Builders Alliance, in partnership with the Midwest Asset Building Conference, offers this training designed to help nonprofit, community-based organizations enhance their understanding of credit building as an asset-building strategy, and offers best practices in credit education.

INITIATIVES

[August Is #ABLEtoSave Month](#)

The ABLE National Resource Center sponsors this grassroots education and informational campaign about Achieving a Better Life Experience (ABLE) accounts to raise awareness about ABLE accounts and to accelerate the number of ABLE accounts opened across the country.

[Bank On Coalition Website Branding](#)

The Cities for Financial Empowerment Fund is supporting local Bank On coalitions in developing a professional, branded online identity for their work using free, customizable website templates. For more information, contact bankon@cfefund.org.

[Financial Empowerment Center 2019 Planning Cohort](#)

The Cities for Financial Empowerment (CFE) Fund is offering grants to up to 15 local governments looking to plan how to bring the Financial Empowerment Center (FEC) model of free, professional, one-on-one financial counseling/coaching to local residents. Selected government partners will receive up to \$20,000 and technical assistance for six to 12 months to design and prepare for the launch of an FEC. The CFE Fund will invite successful planning cohort grantees to apply for an implementation matching grant of up to \$250,000 at the conclusion of this planning period.

RESOURCES

[Benefits of Banker-Led Personal Finance](#)

Educators can use this flyer from the American Bankers Association Foundation when helping communities understand the benefits of banker-led personal finance training in classrooms.

[Benefits of Volunteering for Teach Children to Save](#)

Volunteer coordinators can use this flyer from the American Bankers Association Foundation to build excitement about volunteering to teach personal finance in classrooms.

[Consumer Financial Protection Bureau Audio Brochures](#)

The Consumer Financial Protection Bureau has released a number of its brochures in audio format in the eight most widely spoken languages in the United States.

[Consumer Financial Protection Bureau Child Savings Account Topic Briefs](#)

The Consumer Financial Protection Bureau has released four topic briefs that explain how child savings account programs are designed to help parents, children, and caregivers to increase enrollment and completion of postsecondary education.

[Consumer Financial Protection Bureau Glossary of English-Chinese Financial Terms](#)

The Consumer Financial Protection Bureau provides this glossary to help Chinese language readers better understand their options when making financial choices.

[Consumer.gov](#)

This Federal Trade Commission website provides resources about credit, debt, identity theft, and avoiding scams, as well as budgeting, opening a bank account, shopping for prepaid cards, and managing money in general. The website is available in Spanish at www.consumidor.gov.

[Dealing With Weather Emergencies](#)

This Federal Trade Commission website has practical tips to help consumers prepare for, deal with, and recover from a weather emergency.

[FDIC Deposit Insurance Education Materials](#)

The Federal Deposit Insurance Corporation has made significant improvements to its deposit insurance education materials. The changes are designed to allow the public to quickly access basic information while still offering the traditional in-depth and comprehensive deposit insurance information.

[IdentityTheft.gov](#)

This Federal Trade Commission website helps people report and recover from identity theft. It is available in Spanish at www.robodeidentidad.gov.

[Managing Someone Else's Money](#)

The Consumer Financial Protection Bureau is making its Managing Someone Else's Money resources available to financial institutions to enable them to co-brand the guides with their institutions' logos.

[Money as You Grow Bookshelf](#)

The Consumer Financial Protection Bureau has added new titles to the parent and caregiver guide.

[Money Smart News—Spring 2019](#)

The Federal Deposit Insurance Corporation offers its quarterly newsletter featuring tips, updates, and success stories about its Money Smart program for financial educators.

[MoneySKILL](#)

The AFSA Education Foundation offers this personal finance course with 37 modules. The course focuses on income, expense, saving and investing, credit, and insurance. The course is available in English and Spanish.

[MyCreditUnion.gov](#)

The National Credit Union Administration's official consumer protection website, MyCreditUnion.gov, offers educational information, resources, and articles designed to help individuals make smarter financial decisions and better choices with their money.

MyMoney.gov

This U.S. Department of the Treasury website provides financial education information and resources from across the federal government. The website highlights MyMoney Five (which provides links to resources and tools related to five principles for managing money), a research clearinghouse, games for youth focused on money, and a section on financial choices for major life events.

[OCC Financial Literacy Resource Directory](#)

The resource directory provides information on financial literacy resources, issues, and events of importance to bankers, organizations, and consumers of all ages. The resource directory includes descriptions of, and contact information for, government programs on financial literacy education and capability and a sampling of organizations whose missions are to support financial literacy through campaigns, fact sheets, newsletters, conference materials, publications, and websites.

[Online Lesson Plans and Publications](#)

The Federal Reserve Bank of Philadelphia offers these lesson plans for various grade levels for educators' use.

[Personal Finance Lesson Plans](#)

Next Gen Personal Finance offers these lesson plans in personal finance for teachers.

[Phishing: Don't Take the Bait](#)

The American Bankers Association Foundation, in collaboration with the Federal Trade Commission, offers information on phishing, a type of computer scamming.

[Protect Your Identity: What Older Adults Should Know](#)

The Consumer Financial Protection Bureau's *Identity Protection Guide* helps consumers protect their personal information.

[Report on the Economic Well-Being of U.S. Households](#)

This report is the Federal Reserve Board's sixth annual report. The report examines the economic well-being and financial lives of Americans and their families.

[SEC Investor.gov Alerts and Bulletins](#)

The U.S. Securities and Exchange Commission's Office of Investor Education and Advocacy provides numerous news alerts and bulletins for individual investors. Learning how to invest wisely and safely can assist investors in reaching their financial and retirement goals. These reports help inform investors about fraud and other information relevant to investing in stocks, bonds, mutual funds, and other securities.

[Short-Term Financial Stability: A Foundation for Security and Well-Being](#)

This report from the Aspen Financial Security Program explains the central role that short-term financial stability plays in a person's ability to reach financial security and upward mobility.

[When I'm 65 Documentary and National Engagement Program](#)

When I'm 65 is a national documentary and multi-year engagement program exploring how our financial and lifestyle choices today affect the whole of our lives. The website also offers toolkits for individuals and educators on a variety of financial issues.

[Worth!](#)

The Federal Reserve Bank of Philadelphia offers this banking role-play curriculum for students in grades 7–12. Students learn about risk, reward, profit, and banking.

HelpWithMyBank.gov: The OCC's HelpWithMyBank.gov website provides answers to commonly asked banking questions. While targeted to customers of national banks and federal savings associations, the website has answers to many questions common to all consumers of banking services and provides useful information about contacting regulators of state banks and other financial institutions. The site includes an online complaint form for bank customers wishing to register their concerns with the OCC.

Subscribe/unsubscribe: Sign up for the OCC's *Financial Literacy Update* by visiting www.occ.gov/emaillist.

Have an upcoming financial literacy event worth noting? Rolling out a new financial literacy initiative? Developing a new tool or product? Have general feedback? Email us at communityaffairs@occ.treas.gov.