

The Office of the Comptroller of the Currency (OCC)'s **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](http://www.occ.gov/flu) for more information. We welcome your feedback.

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

## EVENTS

### [Financial Coaching Fundamentals and Specialty Training on the Web](#)

#### **March–April 2020 (Online)**

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

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

#### **March–April 2020 (Various Locations)**

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

### [Virtual Professional Development for Personal Finance Teachers](#)

#### **March–April 2020 (Online)**

Next Gen Personal Finance offers interactive, collaborative professional development training including personal finance content, differentiation strategies, and resources for the classroom.

### [National Consumer Protection Week](#)

#### **March 1–7, 2020 (Nationwide)**

The Federal Trade Commission (FTC), other federal agencies, and nonprofit organizations sponsor this event. The event, the website, and a blog help people understand their consumer rights and make well-informed decisions about money.

### [2020 Professional Development for Educators](#)

#### **March 9, 2020 (Moab, Utah)**

The Utah Jumpstart Coalition and Fidelity Investments hosts this professional development workshop in Moab for teachers, principals, vice principals, curriculum directors, administrators and other personnel working in Utah's K-12 schools.

### [National Interagency Community Reinvestment Conference](#)

#### **March 9–12, 2020 (Denver)**

The National Interagency Community Reinvestment Conference is the premier conference for community development professionals, featuring Community Reinvestment Act compliance training, thought leadership on emerging trends and issues, including CRA modernization, and tours highlighting on-the-ground success stories in local communities. The conference is sponsored by the Office of the Comptroller of the Currency; the Federal Reserve Banks of San Francisco, Chicago, and Kansas City; the Federal Deposit Insurance Corporation; and the Board of Governors of the Federal Reserve System.

### [Financial Fun at the Fed](#)

#### **March 13, 2020 (Charlotte, N.C.)**

The Charlotte branch of the Federal Reserve Bank of Richmond sponsors this event so high school teachers can learn about the Federal Reserve's personal finance resources.

### [Real World Camp](#)

**March 17–April 27, 2020 (N.D.)**

The North Dakota Jump\$tart Coalition sponsors this free event for students in grades 5 through 8 in Bismarck, Fargo, Grand Forks, Jamestown, Minot, and Williston. Students find out what it takes to be financially “grown up” for a day.

### [Score a Better Future](#)

**March 19, 2020 (Kansas City, Mo.)**

Join FICO and Money Smart Kansas City to learn about the key ingredients in the FICO credit score from FICO experts. You will get your FICO score for free and receive one-on-one counseling from local nonprofit credit counselors.

### [Annual Conference on Financial Education](#)

**March 23–25, 2020 (New Orleans)**

The Institute for Financial Literacy hosts its Annual Conference on Financial Education. The conference offers professional development and networking opportunities for those involved in financial literacy education.

### [Military Saves Month](#)

**April 2020 (Nationwide)**

This national event brings together organizations to encourage military service members and their families to successfully save, despite the challenges and obstacles this community faces.

### [Money Smart Week](#)

**April 4–11, 2020 (Nationwide)**

Money Smart Week is a public awareness campaign designed to help consumers better manage their personal finances. Hundreds of organizations across the country—including businesses, financial institutions, schools, libraries, nonprofit groups, government agencies, and the media—come together to stress the importance of financial literacy.

### [Arkansas Personal Finance Challenge](#)

**April 8, 2020 (Little Rock, Ark.)**

The Federal Reserve Bank of St. Louis sponsors this competition, in which high school students, accompanied by a teacher or coach, analyze a case study of a family’s finances. Students make recommendations to improve or maintain the family’s financial well-being.

### [Florida Jump\\$tart Financial Wellness Conference](#)

**April 10, 2020 (Miami)**

The Florida Jump\$tart Coalition sponsors this training event on financial education.

### [Jump\\$tart Annual Awards Dinner and General Partner Meeting](#)

**April 22–23, 2020 (Washington, D.C.)**

The Jump\$tart Coalition for Personal Financial Literacy hosts its Annual Awards Dinner on April 22 followed by the general partner meeting on April 23. See the web site for more details.

### [Teach Children to Save Day 2019](#)

**April 24, 2019 (Nationwide)**

Teach Children to Save, a program sponsored by the American Bankers Association (ABA) Foundation, brings together students and bankers to promote savings education. The foundation invites bank volunteers to visit classrooms and share information with students about fundamental money skills.

### [NCRC Just Economy Conference](#)

**April 27–29, 2020 (Washington, D.C.)**

The National Community Reinvestment Coalition’s annual conference brings together community nonprofit groups, policymakers, government officials, small businesses, banks, and academia to discuss creating a just economy.

### [National Personal Finance Challenge](#)

**May 4, 2020 (Lincoln, Neb.)**

High school students, accompanied by a teacher or coach, showcase their expertise in earning income, buying goods and services, saving, using credit, investing, and protecting and insuring. State competition winners qualify and compete for prizes.

### [EMERGE Financial Health Forum](#)

**May 5–7, 2020 (Atlanta)**

The Financial Health Network sponsors this conference on consumer financial health. The theme of this year’s meeting is “The Future 15 Building the Next Era of Financial Health.”

### [Classroom Connections](#)

**May 14, 2020 (Merrimack, N.H.)**

The New Hampshire Jump\$tart Coalition sponsors this annual, one-day conference to help educators increase their personal financial literacy skills.

### [HOPE Global Forums 2020 Annual Meeting](#)

**May 27–29, 2020 (Atlanta)**

Operation HOPE sponsors this global forum to inspire innovation and thought leadership toward an inclusive global economy. Meet with government, corporate, and community leaders from around the world for three days of discussions, networking, and turning ideas into action.

[Personal Finance by Your Design: Active, Online, or Blended](#)

**June 9, 2020 (St. Louis, Mo.)**

The Federal Reserve Bank of St. Louis sponsors this event for middle and high school teachers. Attendees create personal finance courses or units aligned to the Missouri and Illinois standards.

[Tennessee Jump\\$tart Personal Financial Education 16th Annual Conference](#)

**June 10–12, 2020 (Gatlinburg, Tenn.)**

The Tennessee Jump\$tart Coalition sponsors this collaborative training event. The conference features personal finance educators and subject matter experts.

[Credit Builders Alliance Credit Building Symposium in D.C.](#)

**June 17–19, 2020 (Washington, D.C.)**

The Credit Builders Alliance sponsors this symposium that addresses the link between the work being done in the credit-building field and the broader issues of income inequality, poverty reduction, and asset building.

[\\$tart \\$mart Teacher Summit](#)

**June 19, 2020 (Salt Lake City)**

The Utah Jump\$tart Coalition hosts this summit for educators, who will receive in-depth training on a variety of financial and economic literacy topics.

[Financial Literacy Day on the Hill](#)

**June 24, 2020 (Washington, D.C.)**

The Jump\$tart Coalition for Personal Financial Literacy sponsors this annual event on Capitol Hill, featuring financial literacy exhibits from more than 60 nonprofit, for-profit, and government entities.

## INITIATIVES

[Financial Planning Grants](#)

The Foundation for Financial Planning is accepting grant applications from nonprofit organizations whose programs link pro bono planners to people in need. Programs should include one-on-one engagements between Certified Financial Planner professionals and pro bono clients, be scalable, replicable, and sustainable. Grants are generally in the range of \$5,000 to \$40,000, and applications must be submitted by April 30, 2020.

[Local Consumer Financial Protection Initiative](#)

The Cities for Financial Empowerment Fund seeks proposals from mayoral or county administrations interested in developing strategic plans for building robust consumer financial protection capabilities in their local governments and working to secure fair consumer financial marketplaces. Applications must be received by March 6, 2020.

[Volunteers for the National LifeSmarts Championship](#)

The National Consumers League is seeking volunteers to assist in its National LifeSmarts Championship in Washington, D.C., from April 25–28, 2020. Volunteers will serve as expert judges, emcees, question masters, scorekeepers, timekeepers, and referees. LifeSmarts is an online competition open to all students in grades 6–12. State champions are invited to compete in the National LifeSmarts Championship.

# RESOURCES

## [2019 Financial Literacy Annual Report](#)

This report details the Consumer Financial Protection Bureau's financial literacy activities and strategy to improve the financial literacy of consumers.

## [2019 Financially Underserved Market Size Study](#)

This Financial Health Network report explores marketplace evolution and growth in financial products and highlights the opportunity to develop innovative, high-quality solutions to improve the financial health of the financially underserved.

## [Age-Friendly Banking & Low- to Moderate-Income Older Adults: Standards for a Growing Market](#)

This National Community Reinvestment Coalition report recommends core standards and features for personal banking accounts for low- and moderate-income older adults, including services and protections to guard customers from financial fraud and exploitation.

## [Building Blocks of Youth Financial Capability](#)

The Consumer Financial Protection Bureau has activities for middle school teachers to help their students develop the building blocks of youth financial capability.

## [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](http://www.consumidor.gov).

## [Curriculum Materials for Trainers](#)

Federal Student Aid offers curriculums for those providing professional development training for high school counselors.

## [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.

## [FDIC.gov/youthsaving](#)

This Federal Deposit Insurance Corporation website features resources for national, regional, and local banks that seek to combine youth financial literacy with access to savings accounts through K-12 school engagements. The website also features information on how financial institutions may join 80 other banks participating in the Youth Banking Network.

## [Financial Field Manual: The Personal Finance Guide for Military Families](#)

The Investor Protection Trust, in partnership with Kiplinger's Personal Finance, offers this guide for servicemembers and their families. The guide includes information about new retirement savings opportunities and withdrawal options and updates resources for 2020.

## [Guide to Building an Emergency Fund](#)

This Consumer Financial Protection Bureau guide includes in-depth information to help prepare readers to cover unplanned expenses by starting an emergency fund.

## [IdentityTheft.gov](#)

This Federal Trade Commission website helps people report and recover from identity theft. It is available in Spanish at [Robodeidentidad.gov](http://Robodeidentidad.gov).

## [Managing Someone Else's Money in eBooks](#)

The Consumer Financial Protection Bureau's "Managing Someone Else's Money" guides are now available in eBook format, in English and Spanish, at its online bookstore.

## [Managing Your Money When You're Starting Out](#)

The Investor Protection Trust offers this guide for teens and young adults that focuses on how to start saving, filing tax returns, being smart about student loans, building credits and managing debt, starting a retirement account, and becoming an investor.

## [MyCreditUnion.gov](#)

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

## [MyMoney.gov](https://www.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.

## [NGPF Arcade](https://www.ngpf.org)

Next Gen Personal Finance offers eight online games that make personal finance come alive for middle and high school students.

## [OCC Financial Literacy Resource Directory](https://www.occ.gov/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. It also includes organizations whose missions are to support financial literacy through campaigns, fact sheets, newsletters, conference materials, publications, and websites.

## [Resources for Employers](https://www.consumerfinance.gov/resources-for-employers)

The Consumer Financial Protection Bureau offers free tools and tips to help organizations improve the financial well-being of their employees.

## [SEC Investor.gov Alerts and Bulletins](https://www.sec.gov/alerts-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.

**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.

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**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](mailto:communityaffairs@occ.treas.gov).

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