EVENTS

Financial Coaching Fundamentals and Specialty Training on the Web
November 2019 (Online)
Change Machine offers regularly scheduled web-based training on financial coaching. The presentations cover financial security fundamentals and specialized topics.

Financial Literacy Seminar Series in Washington
November 2019 (Washington, D.C.)
The Board of Governors of the Federal Reserve System and the Global Financial Literacy Excellence Center (GFLEC) at George Washington University sponsor this initiative, which brings together academics, practitioners, policymakers, and other experts to discuss cutting-edge research in financial literacy.

Teacher Workshops in Southeastern U.S.
November 2019 (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.

National Educator Conference
November 1–3, 2019 (Washington, D.C.)
The Jump$tart Coalition’s 10th annual conference offers tools, resources, and support for educators of pre-K–12 students.

America Saves Summit: Attacking the Savings Crisis
November 6, 2019 (Washington, D.C.)
This summit, sponsored by America Saves, features representatives from the government, private industry, financial services, academia, the military, the nonprofit sector, and the news media for an in-depth conversation about the current status of saving in the United States.

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. Another topic of discussion is best practices in credit education.

Financial Education in Oklahoma
November 13, 2019 (Norman, Okla.)
The Oklahoma Jump$tart Coalition sponsors this conference.

Financial Well-Being Research Conference
November 13, 2019 (Washington, D.C.)
This conference, sponsored by the Consumer Financial Protection Bureau, brings together researchers, practitioners, and policymakers to discuss the latest research on financial well-being.
Coaching Essentials
November 17−18, 2019 (Portland, Ore.)
The Association for Financial Counseling and Planning Education (AFCPE) offers this workshop on the philosophy and principles of coaching. Participants practice applying the skills and techniques in financial conversations.

2019 Annual Research and Training Symposium
November 19−21, 2019 (Portland, Ore.)
The AFCPE hosts this conference for personal finance professionals working in research, practice, and educational settings.

She Leads: Women's Investment and Financial Empowerment Forum
November 20, 2019 (Columbus, Ga.)
The Georgia Secretary of State and the Investor Protection Trust, in collaboration with the Association for Financial Counseling and Planning Education, sponsor this one-day forum to raise awareness of the issues and challenges women face in securing, protecting, and growing their wealth.

Financial Services Conference in Washington
December 5−6, 2019 (Washington, D.C.)
The Consumer Federation of America’s 31st annual conference, planned with the assistance of consumer groups and the financial services industry, brings together federal and state policymakers and regulators to discuss banking, insurance, investment, and real estate issues affecting consumers.

National Interagency Community Reinvestment Conference Save the Date!
March 9−12, 2020 (Denver, Colo.)
Plan now to attend the 2020 National Interagency Community Reinvestment Conference (NICRC) at the Sheraton Denver Downtown Hotel. The NICRC is the premier conference for community development professionals, featuring Community Reinvestment Act compliance training, thought leadership on emerging trends and issues, and tours highlighting on-the-ground success stories in local communities. The conference is sponsored by the Federal Reserve Banks of San Francisco, Chicago, and Kansas City; the Federal Deposit Insurance Corporation; the Board of Governors of the Federal Reserve System; and the Office of the Comptroller of the Currency.

INITIATIVES

2019–2020 Lights, Camera, Save! Video Contest
The American Bankers Association (ABA) Foundation is sponsoring its 10th annual video contest for banks to encourage teenagers to educate themselves and their peers about the value of saving and using money wisely. Banks host local competitions and select winners to compete in a national competition for up to $5,000 toward their savings goals. Student entries must be submitted by December 3, 2019.

Bank On Capacity Grants
The Cities for Financial Empowerment (CFE) Fund’s Capacity Grant aims to assist leadership on local Bank On coalitions in expanding banking access. Local Bank On coalitions can apply; applicants should be coalition leaders, from either city or local government agencies, or nonprofit community organizations working with local government. These capacity grants can be as high as $25,000 and are presented on a rolling basis.

Bank On Innovation Fund
The CFE Fund supports the development of replicable, large-scale programs that connect underserved populations to certified accounts to enable households to preserve their earnings and build assets. The CFE Fund makes grants of up to $50,000 on a rolling basis to implement programs or pilot projects that test new, innovative methods of reaching underserved markets, particularly through local government service channels.
RESOURCES

2020–2021 FAFSA Form Now Available
The 2020–2021 Free Application for Federal Student Aid form is available to students and parents to complete. Visit the myStudentAid mobile app and the fafsa.gov website.

Building Blocks of Youth Financial Capability
The Consumer Financial Protection Bureau offers these classroom activities for middle school educators.

Building Your Savings? Start With Small Goals
The Consumer Financial Protection Bureau offers this fourth and newest edition of its “Your Money, Your Goals” suite of financial empowerment tools.

Clinician's Pocket Guide to Prevent Elder Fraud
This resource is designed to be used by health care professional and others who work with older Americans. The pocket guide lists common red flags of financial exploitation and financial capacity and describes the types of referrals that may be needed. The guide is part of the Elder Investment Fraud and Financial Exploitation Prevention Program.

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.

FDIC Consumer News: Beware of Fake Checks
The Federal Deposit Insurance Corporation’s Consumer News newsletter discusses how fake checks are used in scams.

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.

Hands on Banking
This online learning center offers resources for anyone who wants to learn about money management.

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

Money Circle Toolkit
The Consumer Financial Protection Bureau’s financial toolkit helps people understand how family and friends influence their financial decisions.

MoneySkill
The American Financial Services Association Education Foundation offers this free, online personal finance curriculum. The curriculum has modules focused on a variety of topics, including income, saving and investing, credit, and insurance. The curriculum is available in English and Spanish and is audio-equipped for English users.

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.
**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.

**Your Reverse Mortgage After a Natural Disaster**

The Consumer Financial Protection Bureau offers this guide for borrowers with home equity conversion mortgages. The guide explains what to do after homes have been affected by natural disasters.

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**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](http://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.

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