

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.

[COVID-19](#) [Events](#) [Initiatives](#) [Resources](#)

## COVID-19

### American Bankers Association

- [Tips to Avoid Scams and Protect Your Money](#)

### Association for Financial Counseling & Planning Education

- [Free Virtual Financial Counseling and Coaching](#)

### Commodity Futures Trading Commission

- [Be on Alert for Frauds Seeking to Profit From Market Volatility](#)
- [Beware of Fee Scams Targeting Workers Sidelined by COVID-19](#)

### Consumer Federation of America

- [America Saves COVID-19 Resources](#)
- [Military Saves COVID-19 Resources](#)

### Consumer Financial Protection Bureau

- [Protecting Your Finances](#)
- [Financial Education Resources for Older Adults, Their Families, and Practitioners](#)
- [Mortgage and Housing Assistance](#)
- [Navigating an Early and Unexpected Retirement](#)

### Federal Communications Commission

- [Consumer Warnings and Safety Tips](#)

### Federal Deposit Insurance Corporation

- [Information for Bankers and Consumers](#)

### Financial Health Network

- [Responding to the Crisis](#)

### Foundation for Financial Planning

- [Pro Bono Planning Resource Center](#)

### George Washington University Global Financial Literacy Excellence Center

- [Financial Resilience Hub](#)

### Internal Revenue Service

- [Tax Relief and Economic Impact Payments](#)

### National Community Reinvestment Coalition

- [Webinar about Older Adults, Banking, and Financial Management](#)

### National Credit Union Administration

- [Frequently Asked Questions for Credit Union Members](#)

### National Disability Institute

- [Financial Resilience Center](#)

### National Foundation for Credit Counseling

- [Emergency Financial Help](#)

### National Housing Conference

- [COVID-19 Housing Resource Center](#)

### NeighborWorks America

- [COVID Help for Home](#)
- [Mortgage Relief and Foreclosure](#)

### OCC's HelpWithMyBank

- [Frequently Asked Questions](#)

## **Operation HOPE**

- [HOPE Inside Disaster](#)

## **U.S. Consumer Product Safety Commission**

- [Home Safety Information Center](#)

## **U.S. Department of Defense**

- [Resources for the Military Community](#)

## **U.S. Department of Education**

[Forbearance Information for Students, Borrowers, and Parents](#)

## **U.S. General Services Administration**

- [Disaster Financial Assistance](#)

## **U.S. Securities and Exchange Commission**

- [Frauds Targeting Main Street Investors](#)
- [Look Out for Coronavirus-Related Investment Scams](#)

## **U.S. Small Business Administration**

- [Federal Resources for Small Business](#)

## **Women's Institute for a Secure Retirement**

- [COVID-19 Financial Resources Flyer](#)

# EVENTS

## **[Connecting to Reimagine: Money and COVID-19 Webinar Series](#)**

**September–October 2021 (Online)**

The George Washington University Global Financial Literacy Excellence Center (GFLEC) sponsors webinars to help interested parties connect with thought leaders from the public, private, and academic sectors. The webinars help participants expand their knowledge about how decision makers handle problems arising from the pandemic.

## **[Financial Literacy Seminar Series](#)**

**September–October 2021 (Online)**

This Board of Governors of the Federal Reserve System and the Global Financial Literacy Excellence Center at George Washington University series will resume virtually this fall. The seminars offer academic presentations on cutting-edge research on financial literacy. Please check the website for updates.

## **[Virtual Teacher Workshops in Midwestern United States](#)**

**September–October 2021 (Online)**

The Federal Reserve Bank of St. Louis sponsors teacher workshops and events online in Arkansas, Illinois, Indiana, Kentucky, Mississippi, Missouri, and Tennessee. These events cover financial capability and economics topics.

## **[#ThinkLikeASaver Town Hall: Paying for Education](#)**

**September 23, 2021 (Online)**

America Saves' town hall will bring together financial experts, influencers, and everyday Americans to identify successful savings strategies. Another town hall, scheduled for October 2021, will focus on helping people with disabilities save money. For more information, contact [info@americasaves.org](mailto:info@americasaves.org).

## **[Annual Financial Literacy and Economic Education Conference](#)**

**September 29–October 1, 2021 (Online)**

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

## **[HOPE Global Forums 2021 Annual Meeting](#)**

**October 19–21, 2021 (Online)**

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.

### **Get Smart About Credit Day**

**October 21, 2021 (Nationwide)**

The American Bankers Association (ABA) Community Engagement Foundation sponsors this event to provide bankers with tools and resources to go into classrooms, connect with youth groups, and visit colleges and high schools to help young people learn how to budget for college, use credit responsibly, build a positive payment history, and protect their identity. The program is open to all banks, including non-ABA members.

### **Women's Institute for a Secure Retirement's 17th Annual Symposium on Financial Solutions for Women and 25th Anniversary Reception**

**October 28, 2021, Reception (Washington, D.C.)**

**October 29, 2021, Symposium (Online)**

The symposium examines the issues that women face in securing retirement income and explores creative solutions for improving long-term financial security.

### **National Educator Conference**

**November 6–8, 2021 (Washington, D.C.)**

The Jump\$tart Coalition's 12th annual conference offers tools, resources, and support for educators of pre-K–12 students.

### **2021 AFCPE Research and Training Symposium**

**November 15–19, 2021 (Online)**

The AFCPE hosts this conference for personal finance professionals working in research, practice, and educational settings.

## INITIATIVES

### **LifeSmarts Online Consumer Challenge**

The National Consumers League hosts LifeSmarts, an online competition open to all students in grades 6–12. For 28 years, LifeSmarts has been empowering teens to become smart, savvy consumers. Each month, LifeSmarts focuses on a different category important to teen consumers: personal finance, health and safety, consumer rights and responsibilities, technology, and the environment. Students compete online and in person throughout the year to win scholarships and prizes. Experts in LifeSmarts subject areas are needed to serve as judges and officials at the state and national competitions.

### **Pro Bono Planner Match**

The Foundation for Financial Planning sponsors the planner match, which connects financial planners who want to help underserved people and nonprofit organizations that offer pro bono services.

### **Project REACH**

The OCC's Project REACH (Roundtable for Economic Access and Change) brings together leaders from the banking industry, national civil rights organizations, business, and technology to promote financial inclusion through greater access to credit and capital. The initiative seeks to reduce specific barriers that prevent full, equal, and fair participation in the nation's economy.

### **#ResilientPwD Text Campaign**

This National Disability Institute campaign delivers text messages to people with disabilities and chronic health conditions to help combat financial and emotional stress and feelings of isolation during the COVID-19 pandemic. Text RESILIENT to (833) 632-0273 to begin receiving text messages twice a week.

## RESOURCES

### **Building Blocks of Youth Financial Capability**

The Consumer Financial Protection Bureau offers resources, designed for use in a single class period, to teach youth financial literacy skills. The resources are for all grade levels and can be used in a variety of subject areas.

### **Child Tax Credit Toolkit**

This resource helps Americans understand the child tax credit expansion that is a part of the American Rescue Plan.

### **[Consumer Advisory – Know Your Rights Under the Servicemember Civil Relief Act](#)**

This Consumer Financial Protection Bureau consumer advisory alerts military and veteran consumers about their waiver rights and regarding lease termination notification options under the amended Servicemember Civil Relief Act.

### **[Consumer Financial Protection Bureau](#)**

The Consumer Financial Protection Bureau has numerous publications covering a range of financial topics that may be downloaded or ordered in bulk.

### **[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).

### **[EDGAR Database](#)**

The U.S. Securities and Exchange Commission recently updated this database of online corporate filings to help site users quickly find companies' filings.

### **[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.

### **[Financial Aid Toolkit](#)**

The U.S. Department of Education provides tools and resources to help parents and students learn about financial aid.

### **[Financial Coaching Initiative: Results and Lessons Learned](#)**

This Consumer Financial Protection Bureau report documents how the bureau implemented a 60-site financial coaching initiative and presents data and lessons for service providers interested in coaching.

### **[Going It Alone – A Guide for Widows: Five Steps for Navigating Financial Challenges](#)**

The Women's Institute for a Secure Retirement's guide helps widows navigate the immediate financial challenges after losing a spouse and how to make long-term plans for financial security.

### **[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).

### **[Investor.gov](#)**

Investor.gov is the U.S. Securities and Exchange Commission's resource to help investors make informed decisions and avoid fraud. The website includes information on investing and investment products, a glossary of investment terms, alerts and bulletins on frauds and current investment topics, publications, and free financial tools and calculators. Investor.gov also offers a free and simple tool to check the background of an investment professional.

### **[Jump\\$tart's Financial Foundations for Educators Student Impact Study](#)**

This study looks at the impact of the Jump\$tart Coalition for Personal Financial Literacy's Jump\$tart Financial Foundations for Educators program on the personal finance knowledge gains of students taught by teachers who have completed the program.

### **[Keys to Financial Inclusion Podcast – Season Two](#)**

This National Disability Institute's Center for Disability-Inclusive Community Development podcast series features thought leaders from federal agencies, universities, and national organizations who share their perspectives on the inclusion of people with disabilities in community development activities and Community Reinvestment Act activities.

### **[Middle School Personal Finance Course](#)**

Next Generation Personal Finance Academy offers this nine-week program of personal finance content aimed at middle school students.

### **[Money Smart for Older Adults](#)**

The Consumer Financial Protection Bureau and the Federal Deposit Insurance Corporation have added new content about romance scams.

### **[MyCreditUnion.gov](#)**

The National Credit Union Administration's official consumer protection website, MyCreditUnion.gov, offers educational information, resources, and articles designed to help people 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. It also includes organizations whose missions are to support financial literacy through campaigns, fact sheets, newsletters, conference materials, publications, and websites.

### [Outreach Materials for Vulnerable Populations](#)

The Social Security Administration offers resources and materials for people who face barriers to accessing services and benefits.

### [Pro Bono Financial Planning Volunteer Training](#)

The Foundation for Financial Planning offers updated training and a library of webinars to support nonprofit leaders and pro bono financial planners seeking to provide financial guidance to low- and moderate-income people.

### [ReportFraud.ftc.gov](#)

The Federal Trade Commission's website is designed to make it easier for people to report fraud, scams, and bad business practices.

### [StopHomeScams.org](#)

This NeighborWorks America campaign provides consumers who are struggling financially because of the COVID-19 pandemic with information about housing scams, where to report them, and how to connect with housing counselors.

### [Veteran's Investor.gov](#)

The U.S. Securities and Exchange Commission created this page to help veterans save money and avoid fraud.

### [Virtual Workshops for Personal Finance Teachers](#)

The Next Gen Personal Finance Academy's workshops offer teachers free one- and nine-hour personal development courses.

### [What You Need to Know About the 2021 Child Tax Credit Changes](#)

America Saves provides information about changes to the 2021 child tax credit.

**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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