

The Office of the Comptroller of the Currency (OCC)'s *Financial Literacy Update* is a bimonthly e-newsletter that reports upcoming financial literacy events, new initiatives, and related resources of the OCC and other government agencies and organizations.

*Financial Literacy Update* provides brief descriptions and web links for upcoming events in chronological order. It lists new initiatives and resources (with web links) in alphabetical order. We welcome your feedback.

Have an upcoming financial literacy event, new tool, or product? Please email us at [communityaffairs@occ.treas.gov](mailto:communityaffairs@occ.treas.gov). Online versions of *Financial Literacy Update* are available at [www.occ.gov/fli](http://www.occ.gov/fli).

Sign up for the OCC's Financial Literacy Update and other Community Affairs publications at the OCC's Email List Service at [www.occ.gov/emaillist](http://www.occ.gov/emaillist).

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## EVENTS

### [Teacher Workshop Series 2018](#)

**July 20, 2018 (Kansas City, Mo.)**

The Federal Reserve Bank of Kansas City hosts the last in its series of teacher workshops.

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

**July–August 2018**

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

### [Bank On Hampton Roads Free Financial Makeover](#)

**July–October 2018 (Hampton Roads, Va.)**

Bank On Hampton Roads in Virginia offers a free 10-month financial makeover that uses a combination of financial classes and coaching to help participants break free from living paycheck to paycheck. Graduates have seen improvements in savings, debt reduction, credit scores, and asset protection.

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

**July–November 2018**

The Federal Reserve Bank of Atlanta sponsors numerous 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 Teacher Training Program in Philadelphia](#)

**July 9–13, 2018 (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 personal finance course.

### [Take the 'EEK' Out of Economics Workshops in Missouri](#)

**July 10–11, 2018 (St. Charles, Mo.)**

The Federal Reserve Bank of St. Louis offers these workshops providing basic economic and personal finance concepts and ways to dazzle kindergarten and elementary school students with fun activities.

### [Best Practices in Financial Health Measurement](#)

**July 11, 2018 (Nationwide)**

The Center for Financial Services Innovation (CFSI) presents this webinar with a group of innovative financial service providers to learn about the best practices in financial health measurement.

### [Higher Education Financial Wellness Summit in Oregon](#)

**July 15–17, 2018 (Portland, Ore.)**

This event gives educators with a passion for student financial wellness a venue to network with others who value the importance of students understanding how to manage their personal finances.

## **Master Your Money: Financial Freedom**

**July 19, 2018 (Virginia Beach, Va.)**

Bank On Virginia Beach hosts this workshop to teach participants how to identify where their money goes, track personal spending, and find everyday ways to save and develop a personal plan to take control of their money.

## **American Savings Education Council Partners Meeting**

**July 18, 2018 (Washington, D.C.)**

The American Savings Education Council hosts its quarterly meeting. The focus is the role of fin tech in educating about the need to plan and save for retirement.

## **Personal Finance for the Middle School Classroom**

**July 26, 2018 (Johnstown, Pa.)**

The Federal Reserve Bank of Philadelphia sponsors this workshop to introduce middle school teachers to methods of teaching personal finance topics.

## **Moneywi\$er: Personal Finance for Colorado Teachers**

**July 31, 2018 (Grand Junction, Co.)**

The Colorado Jump\$tart Coalition, in partnership with the Colorado Department of Education and Economic Literacy Colorado, hosts this workshop for Colorado teachers.

## **All My Money: Change for the Better Training Class**

**July 31–August 1, 2018 (Decatur, Ill.)**

The University of Illinois Extension offers this training using its All My Money curriculum to teach financial management using a hands-on, experiential approach.

## **Financial Education Boot Camp 2018**

**August 1, 2018 (Mays Landing, N.J.)**

**August 2, 2018 (Branchburg, N.J.)**

The New Jersey Coalition for Financial Education hosts this free, one-day workshop that includes subject matter updates about current personal finance topics and ways to teach personal finance via creative lesson plans, online resources, and technology tools.

## **Coaching Essentials**

**August 9, 2018 (Nationwide Webinar)**

**August 23, 2018 (Nationwide Webinar)**

**November 17, 2018 (Norfolk, Va.)**

**November 18, 2018 (Norfolk, Va.)**

The Association for Financial Counseling and Planning Education (AFCPE) offers this workshop on the philosophy and principles of coaching. Participants will practice applying the skills and techniques in financial conversations.

## **2018 AMBA Fall Workshop**

**August 19–22, 2018 (Washington, D.C.)**

The Association of Military Banks of America (AMBA) conducts its annual workshop to provide an opportunity for its members, government officials overseeing military banking programs, federal regulators, banking trade organizations, and other stakeholders to exchange ideas and discuss the latest banking issues affecting service members and their families.

## **Teacher Training for New England K-12 Educators**

**August 23, 2018 (Smithfield, R.I.)**

The Rhode Island Jump\$tart Coalition hosts this free, one-day personal finance professional development program.

## **2018 Prosperity Summit (Formerly the Assets Learning Conference)**

**September 5–7, 2018 (National Harbor, Md.)**

Prosperity Now (formerly the Corporation for Enterprise Development) sponsors this event that brings together more than 1,300 stakeholders for three days of intensive capacity-building workshops, plenary sessions, and round tables dedicated to creating economic opportunity in the United States.

## **Financial Literacy Conference in New Orleans, La.**

**September 13–14, 2018 (New Orleans, La.)**

The Society for Financial Education and Professional Development, Inc., hosts the Eleventh Annual Financial Literacy Leadership Conference, “Wealth: Paying Your Way Forward.” Participants gain important information and strategies for enhancing the financial literacy of Americans.

## **2018 Reinventing Our Communities: Investing in Opportunity**

**October 1–3, 2018 (Baltimore, Md.)**

The Federal Reserve Bank of Philadelphia sponsors this biennial conference that explores strategies to best leverage different forms of capital to help neighborhoods and individuals reach their full potential and to share in the value-creating vitality that is the U.S. economy.

## **NFCC Connect Conference**

**October 1–3, 2018 (Dallas, Texas)**

The National Foundation for Credit Counseling hosts its annual conference.

## [Council for Economic Education’s Annual Financial Literacy & Economic Education Conference in Atlanta](#)

October 5–6, 2018 (Atlanta, Ga.)

The Council for Economic Education conference is a nationwide gathering of educators. The conference features a diverse selection of presentations, workshops, and events to enable educators to raise the level of economics and financial literacy among K–12 students.

## [Bank On Leadership Conference](#)

October 9–10, 2018 (New York, N.Y.)

The Cities for Financial Empowerment will host its first Bank On Leadership Conference to bring together coalition leaders to share best practices for coalition success.

## [Get Smart About Credit Day](#)

October 18, 2018 (Nationwide)

The American Bankers Association (ABA) Community Engagement Foundation sponsors this event to teach young people the ABCs of wise credit use. The ABA provides bankers with tools and resources to go into classrooms, connect with youth groups, and visit college campuses 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.

## [National Educator Conference in Cleveland](#)

November 3–5, 2018 (Cleveland, Ohio)

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

# INITIATIVES

## [Bank On Grant Funding](#)

The Cities for Financial Empowerment (CFE) Fund is offering grants to support new or relaunching Bank On coalitions and innovative banking access pilots.

# RESOURCES

## [2018 Prosperity Now Scorecard](#)

Prosperity Now releases its annual scorecard assessing financial security.

## [AARP–Small Business Administration Webinars](#)

AARP and the U.S. Small Business Administration (SBA) host new webinars and republish previous webinars to educate people who want to start businesses or expand existing ones.

## [Bank On Coalition Playbook Chapter: Launching or Relaunching a Bank On Coalition](#)

The Cities for Financial Empowerment Fund released its newest Bank On Coalition Playbook chapter, which provides guidance for new or reinvigorated coalitions launching or relaunching Bank On coalitions.

## [Commonwealth’s Suite of Financial Entertainment Games](#)

Commonwealth offers this suite of financial entertainment games to turn learning financial concepts into fun and engaging activities that lead to real world action.

## [Consumer.gov](#)

This Federal Trade Commission (FTC) website contains free 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).

## [FAFSA Resources](#)

The U.S. Department of Education offers these resources to help students and parents understand the Free Application for Financial Student Aid (FAFSA) process.

## [FDIC Insurance Deposit Education Materials](#)

The FDIC 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.

## [Federal Student Aid Partner Emails](#)

The U. S. Department of Education offers Federal Student Aid Partner emails to school counselors, college access organization staff, and other mentors dedicated to educating students about applying for and receiving federal student aid.

### [IdentityTheft.gov](#)

This FTC website is the federal government's one-stop resource to help people report and recover from identity theft. It is available in Spanish at [www.robodeidentidad.gov](http://www.robodeidentidad.gov).

### [Jump\\$tart Coalition Clearinghouse](#)

The Jump\$tart Coalition offers this online library of financial education resources for teachers, parents, caregivers, and anyone committed to financial smarts for students.

### [Military Consumer Toolkit](#)

The FTC created this website to empower active duty and retired service members, military families, veterans, and civilians in the military community. These free resources can serve as the first line of defense against fraud and help military consumers make better-informed decisions when managing money.

### [Mock ICO Website to Educate Investors](#)

The U.S. Securities and Exchange created this website that mimics a bogus coin offering to educate investors about red flags to look for before investing.

### [MyCreditUnion.gov](#)

The National Credit Union Administration's (NCUA) official consumer protection website, [MyCreditUnion.gov](http://MyCreditUnion.gov), and its financial literacy microsite, Pocket Cents, offer 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 site is a one-stop shop for Americans looking for financial education information and resources from across the federal government. The website highlights MyMoneyFive, a research clearinghouse with information and games focused on youth, and a section on disaster recovery tools.

### [OCC Financial Literacy Resource Directory](#)

The OCC offers numerous resources important to bankers, organizations, and consumers of all ages. Visitors to the website can browse by topic or perform keyword searches, which enables more efficient information searches within the directory.

### [Prizes Facilitate Saving by Youth](#)

Commonwealth offers this brief on the effect of prize-linked savings on a summer youth employment program. The goal was to encourage young workers to save a portion of their summer earnings.

### [Protecting Seniors: A Bank Resource Guide for Partnering with Law Enforcement and Adult Protective Services](#)

The American Bankers Association Foundation offers this guide to help bankers combat financial exploitation of seniors. The guide provides an overview of the state of financial exploitation; identifies current scams, examines what banks can do, including how to report suspected fraud; and outlines the distinct roles of law enforcement agencies and adult protective services and how to partner with them.

### [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.

### [Survey of Household Economics and Decisionmaking](#)

The Federal Reserve System issued its report on the economic well-being of U.S. households.

**HelpWithMyBank.gov:** The OCC's HelpWithMyBank.gov website provides answers to approximately 250 commonly asked banking questions. While targeted to customers of national banks and federal savings associations (FSA), the website has answers to many questions common to all bank and FSA consumers 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.

**Financial Literacy Resource Directory:** The OCC's *Financial Literacy 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.

**MyMoney.gov:** MyMoney.gov is the U.S. government's website dedicated to teaching consumers the basics about financial education. The redesigned, interactive site includes information from 21 federal agencies and bureaus to help consumers plan for life events with financial implications, such as buying a home, balancing a checkbook, and planning for retirement. The website also provides money management tools, such as financial calculators and worksheets.

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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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