

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. Online versions of *Financial Literacy Update* are available at 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.

■ [Upcoming Events](#) ■ [New Initiatives](#) ■ [New Resources](#) ■ [Updates](#)

EVENTS

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

May–June 2018

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.](#)

May–June 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.

[Financial Literacy Seminar Series in D.C.](#)

May–June 2018 (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 bringing together academics, practitioners, policymakers, and other experts to present and discuss cutting-edge research in financial literacy.

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

May–October 2018

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.

[Classroom Connections: A Personal Finance Workshop for Granite State Teachers](#)

May 10, 2018 (New Hampshire)

The New Hampshire Jump\$tart coalition hosts this conference.

[Personal Finance Seminar for Professionals](#)

May 10, 2018 (Virtual)

The University of Maryland Extension presents the 30th Annual Personal Finance Seminar for Professionals. Personal finance experts share practical strategies and discuss personal finance issues.

[9th Annual Fostering Financial Education in Maine Schools Conference](#)

May 11, 2018 (Augusta, Maine)

The Maine Jump\$tart Coalition sponsors this conference.

[All My Money: Change for the Better Training Class](#)

May 17–18, 2018 (Kankakee, Ill.)

June 12–13, 2018 (Sterling, Ill.)

June 25–26, 2018 (Chicago, Ill.)

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.

10th Annual Florida Prosperity Partnership Statewide Training Conference

May 30–June 1, 2018 (Orlando, Fla.)

The Florida Prosperity Partnership (FPP) sponsors this three-day conference with plenary sessions, interactive concurrent sessions, and opportunities to engage with peers. FPP is a nonprofit, statewide coalition of organizations focused on the economic stability, security, and prosperity of all Floridians.

Tennessee Jump\$tart Personal Financial Education Teacher Conference

June 6–8, 2018 (Gatlinburg, Tenn.)

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

Youth Financial Literacy Symposium in Florida

June 8, 2018 (Orlando, Fla.)

The Florida Jump\$tart Coalition sponsors this one-day conference providing information and resources for Florida teachers who provide financial education instruction to elementary through high school students.

76 Ways to Teach Personal Finance Workshop in St. Louis

June 12, 2018 (St. Louis, Mo.)

The Federal Reserve Bank of St. Louis offers this workshop to Missouri high school teachers to help them with teaching the new Missouri standards for personal finance. The workshop is free, but registration is required by June 5, 2018.

Summer Camp Challenge in Virginia

June 19–August 23, 2018 (Richmond, Va.)

The Federal Reserve Bank of Richmond sponsors this free camp for K–8 students. The students use reasoning to play games, solve puzzles, crack clues, and answer riddles about resources, innovation, entrepreneurship, and prices.

Personal Financial Literacy Conference in Iowa

June 28, 2018 (Ankeny, Iowa)

The Iowa Jump\$tart Coalition sponsors this annual conference.

Credit Builders Alliance Credit Building Symposium in D.C.

June 28–29, 2018 (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.

Take the 'EEK' Out of Economics Workshops in Missouri

June 5–6, 2018 (St. Louis, Mo.)

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.

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.

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.

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 (AFCPE) offers this workshop on the philosophy and principles of coaching. Participants will practice applying the skills and techniques in financial conversations.

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.

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.

INITIATIVES

[America Saves for Young Workers](#)

America Saves sponsors this program in which financial institutions partner with youth employment programs to support young workers' use of direct deposit to save automatically.

[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.

[CFPB Seeking Public Comments](#)

The Consumer Financial Protection Bureau is seeking comments and information from interested parties to assist it in assessing the overall efficiency and effectiveness of its consumer financial education programs.

[Calling All Banker Financial Education Volunteers](#)

The American Bankers Association Foundation is asking bankers who participated in the 2018 Teach Children to Save event to complete a short survey on the volunteer experience. Surveys must be completed by June 1, 2018, and 50 survey respondents will have a chance to win a prize.

[LifeSmarts Online Consumer Challenge](#)

The National Consumers League hosts LifeSmarts, an online competition open to all students in grades 6–12. Each month focuses on a different category important to teen consumers: personal finance, health and safety, consumer rights, technology, and the environment. Every year, students who are members of the Future Business Leaders of America (FBLA) or the Family, Career, and Community Leaders of America (FCCLA) have the opportunity to compete online. Winning teams of the Spring/Fall challenge will compete in the LifeSmarts event at FBLA National Leadership Conference in Baltimore, Maryland, and the FCCLA Knowledge Bowl in Atlanta, Georgia. Both events will be held June 28–July 1, 2018.

RESOURCES

[10th Annual NFCC Consumer Financial Literacy Survey](#)

The National Foundation for Credit Counseling released the results of its yearly financial literacy survey.

[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.

[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.

[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.

[Free CFPB Materials](#)

The CFPB offers free copies of its consumer brochures.

[Gender, Generation, and Financial Knowledge: A Six Year Perspective](#)

The FINRA Investor Education Foundation offers this fact sheet that examines the financial knowledge levels in America by gender and generation at three points in time over a six-year period.

[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](#).

[Managing Someone Else's Money Guides](#)

The CFPB now offers its Managing Someone Else's Money guides with state-specific information for the states of Arizona, Florida, Georgia, Illinois, Oregon, and Virginia.

[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.

[MyCreditUnion.gov](#)

The National Credit Union Administration's (NCUA) official consumer protection website, 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.

[A Much Closer Look: Enhancing Savings Counseling at Financial Empowerment Centers](#)

The CFE Fund offers this research report on an innovative approach to defining and tracking efforts to build savings, using new outcome measures and based on pilots conducted in its Nashville and Philadelphia Financial Empowerment Centers.

[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 enable more efficient information searches within the directory.

[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.

[TIAA Institute–GFLEC Personal Finance Index: The State of Financial Literacy Among U.S. Adults](#)

The TIAA Institute and the Global Financial Literacy Excellence Center (GFLEC) have created the Personal Finance Index, which focuses on eight functional areas of knowledge. The 2018 results show that most Americans lack adequate financial literacy.

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.

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