

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 e-mail us at [communityaffairs@occ.treas.gov](mailto:communityaffairs@occ.treas.gov).

Online versions of **Financial Literacy Update** are available at [www.occ.gov/flu](http://www.occ.gov/flu).

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

## EVENTS

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

**May 2016 (Washington, D.C.)**

The Global Financial Literacy Excellence Center at George Washington University and the Board of Governors of the Federal Reserve System sponsor these seminars to highlight recent research findings pertinent to financial literacy education.

### [Financial Coaching Fundamentals and Specialty Training](#)

**May–June 2016**

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 2016**

The Federal Reserve Bank of Atlanta sponsors numerous teacher workshops and events in Alabama, Florida, Georgia, Louisiana, Mississippi, and Tennessee.

### [Alliance for Economic Inclusion Meeting](#)

**May 3, 2016 (Kansas City, Mo.)**

The Alliance for Economic Inclusion partners with the Federal Reserve Bank of Kansas City and the Kansas City Public Schools to promote large-scale collaboration and effective communication to help low- and moderate-income families achieve financial capability and economic mobility.

### [CFPB FinEx Session](#)

**May 6, 2016 (Kansas City, Mo.)**

The Federal Reserve Bank of Kansas City and the Federal Deposit Insurance Corporation (FDIC) host this session for financial education practitioners in Kansas City. The CFPB FinEx was developed by the Consumer Financial Protection Bureau (CFPB) to engage educators in an active discourse about financial capability tools, resources, and partnerships.

### [7th Annual Fostering Financial Education in Maine Schools Conference](#)

**May 6, 2016 (Augusta, Maine)**

The Maine Jump\$tart Coalition sponsors this conference.

### [Maryland Personal Finance Seminar for Professionals](#)

**May 13, 2016**

University of Maryland Extension presents the 28th Annual Personal Finance Seminar for Professionals. This year's conference will be held online. Personal finance experts and high-ranking officials from federal agencies and commissions share practical strategies and discuss personal finance issues.

## **Personal Finance Training for Teachers in Tennessee**

**June–July 2016 (Tennessee)**

The University of Tennessee Extension is approved by the Tennessee Department of Education to prepare high school teachers to teach personal finance. Extension educators are offering two-day workshops across the state that provide the 14 hours of training for teachers to meet the employment requirement to teach personal finance.

## **Teacher Workshop Series in Kansas City**

**June–July 2016 (Kansas City, Mo.)**

The Federal Reserve Bank of Kansas City offers its 2015 summer professional development workshop series. These full-day workshops are free to K–16 educators and include demonstrations of classroom resources, local tours tied to the subject matter, and updates from experts on recent research and hot topics tied to economics and personal finance.

## **‘Economics Across the Curriculum’ Program**

**June–August 2016 (Boston, Mass.; Chicago, Ill.; and Philadelphia, Pa.)**

The American Institute for Economic Research and the Federal Reserve Banks of Boston, Chicago, and Philadelphia sponsor these multi-day Teach the Teacher Initiatives to provide high school teachers of various disciplines an understanding of economic concepts. Because “Economics Across the Curriculum” incorporates economic concepts into various fields of study, the program appeals not only to economics teachers but also to teachers of English language arts, social studies, math, and foreign languages.

## **Tennessee Jump\$tart Coalition Personal Financial Education Teacher Conference**

**June 8–10, 2016 (Gatlinburg, Tenn.)**

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

## **Certified Personal Financial Coach Program**

**June 9 and 23, 2016 (Nationwide)**

The Association for Financial Counseling and Planning Education (AFCPE) and Sage Financial Solutions offer this web-based workshop, which supports integrating coaching skills and financial expertise. Participants explore the continuum of education, counseling, and coaching and learn to facilitate a complete financial coaching engagement for individuals, couples, or groups.

## **9<sup>th</sup> Annual Financial Literacy Summit Series**

**June 9, 21, and 24, 2016 (Paducah, Louisville, and Corbin, Ky.)**

The Kentucky Council on Economic Education sponsors this conference on three different dates. The sessions are designed to equip grade 5–12 educators with the knowledge and tools to give students the opportunity to control their financial futures.

May/June 2016

## **AP Economics Conference 2016**

**June 15–17, 2016 (St. Louis, Mo.)**

The Federal Reserve Bank of St. Louis sponsors this conference for new and seasoned AP economics instructors, as well as those contemplating teaching AP economics.

## **National Summit on Collegiate Financial Wellness**

**June 15–17, 2016 (Columbus, Ohio)**

The Ohio State University hosts the National Summit on Collegiate Financial Wellness to unite educators with a passion for the financial wellness of students in higher education, regardless of the educators’ functional areas of work. Institutions from around the country meet to share best practices, discuss emerging trends related to student finances, and form relationships to help advance individual programs and the field as a whole.

## **Second Global Summit – 11<sup>th</sup> Anniversary of World Elder Abuse Awareness Day**

**June 16, 2016 (Washington, DC)**

The National Adult Protective Services Association, the National Center for Victims of Crime, and the International Network for the Prevention of Elder Abuse, in collaboration with national and international partners, sponsor this event bringing together policy makers, financial services institutions, media, social services organizations, and the general public to address elder abuse.

## **MoneyLIVE Teen Financial Event**

**June 18, 2016 (Houston, Texas)**

Alliance Financial Ministries sponsors this one-day event to teach teens and college-age students personal finance concepts in a realistic environment.

## **‘Expanding Savings and Retirement Opportunities’ Forum**

**July 25, 2016 (Washington, DC)**

This annual forum, hosted by the Women’s Institute for a Secure Retirement, will feature the iOme Challenge winning team of college students discussing their advisory paper. This year’s teams were asked how the private retirement system can be re-imagined to accommodate the needs of those in traditional work arrangements as well as the changes in the work-life patterns of the millennial generation. A keynote speaker and a panel of administration officials and congressional staff leaders will also discuss current legislative proposals.

## **‘Keys to Financial Success’ Teacher Training Program in Philadelphia**

**June 27–July 1, 2016 (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.

## **2016 Credit Builders Alliance Credit Building Symposium**

**July 13–14, 2016 (Washington, DC)**

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

## **'Making Sense of Money and Banking' Course in Philadelphia**

**July 18–22, 2016 (Philadelphia, Pa.)**

The Federal Reserve Bank of Philadelphia sponsors this five-day professional development course, taught by Federal Reserve economic education specialists and staff from the state centers for economic education. The course covers money, banking, and the Federal Reserve System. It includes grade-level-specific breakout sessions aimed at providing teachers with lesson plans that can be used immediately in their classrooms.

## **Financial Literacy Conference in Atlanta**

**October 17–18, 2015 (Atlanta, Ga.)**

The Society for Financial Education and Professional Development Inc. hosts the Ninth Annual Financial Literacy Leadership Conference, "Financial Literacy: What's Trending." Participants gain important information and strategies for enhancing the financial literacy of Americans.

## **National Educator Conference**

**November 5–7, 2016 (Dallas, Texas)**

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

# INITIATIVES

## **2016 DASH for the STASH**

The Investor Protection Institute (IPI) and participating state securities regulators sponsor this investor education and protection program and contest that runs from March 15 to May 15, 2016. The primary goal is to arm investors with unbiased and noncommercial information needed to make crucial investing decisions.

## **ABA Foundation Community Commitment Awards**

The American Bankers Association (ABA) Foundation Community Commitment Awards is a national program that recognizes and promotes the ways banks contribute to economic growth, community development, and enhancing the quality of life in their communities. The entry period is May 1–July 1, 2016.

## **Before You Invest, Investor.gov**

The Securities and Exchange Commission's Office of Investor Education and Advocacy has launched a public service campaign to help investors avoid being defrauded. The campaign reminds investors of the importance of determining if they are dealing with a registered investment professional.

## **Campaign for Every Kid's Future**

The Corporation for Enterprise Development (CFED) is leading this effort of organizations and individuals nationwide who have a shared goal of connecting 1.4 million children to Children's Savings Accounts by 2020.

## **Financial Education Initiative**

The U. S. Department of the Interior Office of the Special Trustee (OST) for American Indians sponsors this effort to positively impact the finances of Native families. The OST will explore and implement educational and experiential learning formats for the very young, and education and skills training for preparation for a post-secondary education, first-time home purchase, budgeting, retirement savings, and estate planning.

## **'When I'm 65' Documentary and National Engagement Program**

The IPI sponsors this national public television documentary and engagement program, which takes a multigenerational approach in exploring how financial and lifestyle choices today will affect the quality of life in retirement. Through the engagement program, grassroots organizations, employers, and professionals can educate communities about living and working longer, retirement planning, and investor protection

# RESOURCES

## [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.

## [AICPA’s 360 Degrees of Financial Literacy](#)

The American Institute of Certified Public Accountants (AICPA) sponsors this website offering free financial tools and resources for every age.

## [A Bank Customer’s Guide to Cybersecurity](#)

The FDIC offers this special edition of the agency’s quarterly FDIC *Consumer News* (Winter 2016) newsletter that discusses what consumers can do, and what banks and regulators are doing to help prevent online fraud and theft.

## [Bank on It Financial Literacy Game](#)

The AICPA offers this free, online game that covers topics high school students need to master to be money savvy in the real world.

## [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).

## [FDIC Deposit Insurance 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.

## [Financial Aid Toolkit from Federal Student Aid \(FSA\)](#)

Federal Student Aid (FSA), an office of the U.S. Department of Education, consolidates student aid resources into a searchable online database intended for use by organizations and individuals who interact with students and families on making financial preparations for postsecondary education. Financial literacy is a critical component of every student’s education, whether he or she is making the decision about where to go to college and how to pay for it, or deciding whether to enter the workforce.

## [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).

## [Money as You Grow](#)

The CFPB is the new home for the Money as You Grow web page for parents and caregivers to help children get a strong start on making financial decisions.

## [MoneySmartKC.org](#)

Money Smart Kansas City offers this website for citizens of Kansas City, Mo., to provide access to financial information in conjunction with Money Smart Month.

## [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.

## [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.

## [Recommendations and Report for Financial Institutions on Preventing and Responding to Elder Financial Exploitation](#)

The CFPB issues this report for banks and credit unions on how they can better protect older consumers from financial abuse.

## [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.

## [ServeOurSeniors.org](#)

The North American Securities Administrators Association offers this website with resources for investors, caregivers, financial professionals, and policymakers. The site also includes an interactive map to help users find contact information for their jurisdictions' regulator, adult protective services agency, and other governmental senior-related services.

**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; and includes an online complaint form for bank customers wishing to register their concerns to 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? E-mail us at [communityaffairs@occ.treas.gov](mailto:communityaffairs@occ.treas.gov).

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