

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).

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## EVENTS

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

May 2017 (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.

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

May–June 2017

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

### [Teacher Training in the Mid-Atlantic U.S.](#)

May–June 2017

The Federal Reserve Bank of Philadelphia offers teacher training programs on financial capability and economics.

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

May–June 2017

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.

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

May 11, 2017 (New Hampshire)

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

### [Poverty and Promise: Uncovering Truths from Financial Diaries Webinar](#)

May 16, 2017 (Nationwide)

The Center for Financial Services Innovation (CFSI) hosts this webinar that will provide insights from the U.S. Financial Diaries. Topics covered include how people spend, save, borrow, and plan, inspiring new ways of improving Americans' financial lives.

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

May 17–19, 2017 (Annapolis, Md.)

The University of Maryland Extension presents the 29th Annual Personal Finance Seminar for Professionals. Personal finance experts and officials from federal agencies and commissions share practical strategies and discuss personal finance issues.

### [2017 Bank On National Conference in Washington](#)

May 23, 2017 (Washington, D.C.)

The Cities for Financial Empowerment Fund sponsors this conference that brings together key stakeholders from multiple sectors across the country to discuss innovations in safe and affordable financial products, strategies for banking access connectivity, and measuring banking access success.

### [2017 Summer Teacher Workshop Series in Kansas City](#)

June–July 2017 (Kansas City, Mo.)

The Federal Reserve Bank of Kansas City offers its 2017 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.

### **Financial Foundations: A Financial Literacy Training for New Mexico Teachers**

**June 7, 2017 (Albuquerque, N.M.)**

The Council for Economic Education offers this free workshop that focuses on teachers as adult learners to better prepare them to teach financial literacy to students in grades K–12. The workshop covers key concepts, strategies, and resources.

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

**June 7–9, 2017 (Gatlinburg, Tenn.)**

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

### **Personal Financial Literacy: The New Social Studies Course for Texas**

**June 13–14, 2017 (Austin, Texas)**

**June 22–23, 2017 (Dallas, Texas)**

**July 17–18, 2017 (Houston, Texas)**

The Federal Reserve Bank of Dallas offers this course based on the scope and sequence of the social studies personal financial literacy course that meets the standards for the TEKS using Federal Reserve resources.

### **EMERGE: Financial Health Forum**

**June 14–16, 2017 (Austin, Texas)**

The Center for Financial Services Innovation (CFSI) sponsors this twelfth annual forum focusing on financial health.

### **Third Global Summit: 12th Anniversary of World Elder Abuse Awareness Day**

**June 15, 2017 (Washington, D.C.)**

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.

### **Summer Camp Challenge in Virginia**

**June 20–August 24, 2017 (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.

### **2017 Credit Builders Alliance Credit Building Symposium**

**June 26–27, 2017 (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.

### **Military Consumer Financial Workshop: Protecting Those Who Protect Our Nation**

**July 19, 2017 (San Antonio, Texas)**

The Federal Trade Commission (FTC) sponsors this event that brings together military consumer advocates and legal services; consumer groups; local, state, and federal government representatives; industry representatives; and members of all the service branches to examine the financial issues and scams affecting active military and veteran consumers.

### **Life After High School: Navigating Education, Career and Debt**

**August 18, 2017 (Virginia Beach, Va.)**

The Federal Reserve Bank of Richmond hosts this teacher workshop created by the Virginia Council on Economic Education to assist teachers in helping students set college and career goals, evaluate their options, choose a post-graduation path, pay for their education, and manage student loans.

### **Common Cents Conference**

**September 12–13, 2017 (Bethesda, Md.)**

The Common Cents Conference addresses the financial issues facing the residents of the Maryland, Washington, D.C., and Virginia region. Attendees learn about innovative program models to help residents achieve their financial dreams.

### **2017 I'm Home Conference in Rhode Island**

**October 2–4, 2017 (Providence, R.I.)**

The Corporation for Enterprise Development (CFED) sponsors this conference bringing together affordable housing developers, lenders, government agency staff members, policymakers, industry experts, homeowners, community organizers, researchers, and funders to consider manufactured housing as a source of affordable housing and asset building for low- and moderate-income families.

### **Council for Economic Education's National Conference in Brooklyn**

**October 6–7, 2017 (Brooklyn, N.Y.)**

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 economic and financial literacy among K–12 students.

### **Vermont Educator’s Conference**

**November 3, 2017 (Burlington, Vt.)**

The Vermont Jump\$tart coalition sponsors this conference.

### **Financial Fitness Coach Training in California**

**November 13–14, 2017 (San Diego, Ca.)**

The Association for Financial Counseling and Planning Education (AFCPE) and Sage Financial Solutions offer this training at the AFCPE Symposium.

### **2017 Annual Research and Training Symposium in California**

**November 15–17, 2017 (San Diego, Ca.)**

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

## INITIATIVES

### **2017 DASH for the STASH**

The Investor Protection Trust, in partnership with participating state securities administrators, offers this annual investor education and protection program and poster contest that seeks to arm investors with the unbiased and noncommercial information needed to make investing decisions.

### **SEC Public Service Campaign**

The U.S. Securities and Exchange Commission’s Office of Investor Education and Advocacy has launched a public service campaign on helping individuals protect themselves from investment fraud.

### **SIFMA Foundation Initiatives**

The SIFMA Foundation, through its Stock Market Game, Capitol Hill Challenge, InvestWrite, and Invest It Forward programs provides opportunities for schools, afterschool programs, parents, and members of the financial industry to come together to teach students in grades 4–12 foundational financial concepts.

## 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 Account Validation and Certification**

The Cities for Financial Empowerment (CFE) Fund invites financial institutions with products they believe meet the Bank On National Account Standards to apply for verification and certification and invites Bank On coalitions to connect financial institutions with whom they are considering partnering with in their communities to do so.

### **Bank on Coalition Playbook**

The CFE Fund offers this best practices resource that covers a range of topics, from constructively partnering with financial institutions to municipal banking access integration strategies.

### **Bank On National Account Standards 2017–2018**

The CFE Fund released an update to its account standards critical to helping consumers pay bills to individuals and small businesses.

### **Consumer.gov**

This 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).

## [Creating Youth Savings Programs in Your Community: A Road Map for Banks, Schools and Nonprofits](#)

The FDIC has released a report on its Youth Savings Pilot program. The report describes promising practices banks can use to develop or expand youth savings programs. The FDIC has also launched its Youth Banking Network, a platform to support banks as they work with school and nonprofit partners to create and expand youth savings programs.

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

The Federal Deposit Insurance Corporation (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.

## [The Federal Reserve and You 2.0](#)

The Federal Reserve Bank of Philadelphia has updated this video showing how the Federal Reserve affects consumers' daily lives.

## [Financial Aid Toolkit From Federal Student Aid](#)

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.

## [Free Consumer Financial Protection Bureau Materials](#)

The Consumer Financial Protection Bureau (CFPB) offers free copies of its consumer brochures.

## [Free Credit Scores for Consumers](#)

The CFPB offers this list of credit card companies that give free credit scores to their existing credit card customers.

## [A Guide for Advancing K-12 Financial Education](#)

The CFPB offers this guide for those who seek to advance the development and implementation of financial education for children and youth.

## [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.roboeidentidad.gov](http://www.roboeidentidad.gov).

## [Keys to Financial Success](#)

The Federal Reserve Bank of Philadelphia offers this complete course plan for teaching personal finance to high school students. It is composed of 52 lessons designed to help teach students personal finance using active and collaborative learning. "Keys to Financial Success" is offered free to schools and teachers.

## [Managing Spending to Achieve Your Goals](#)

The CFPB released this suite of tools for helping consumers and financial educators who work with consumers to help them manage their spending and reach their financial goals. The suite includes a worksheet and two research papers.

## [Military Consumer Toolkit](#)

The FTC created this website to empower active duty and retired servicemembers, 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.

## [Money as You Grow Web Page and Book Club](#)

The CFPB offers this web page with information on its Money as You Grow financial education program. The book club gives parents and caregivers a natural way to start money conversations.

## [Money Smart for Older Adults–Update](#)

The FDIC and the CFPB have updated this curriculum with new information and resources that allow older adults and their caregivers to make comprehensive financial decisions with confidence.

## [Money Smart KC Website](#)

This website offers financial education and family stabilization resources for individuals and families in metropolitan Kansas City, Missouri and Kansas. The site also includes a financial education calendar that lists available classes.

## [Money Smart News](#)

The Winter/Spring 2017 edition of the FDIC's Money Smart News features news and resources to help financial education efforts.

## [MyCreditUnion.gov](http://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](http://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.

## [Race and Financial Capability in America: Understanding the Native American Experience](#)

The Financial Industry Regulatory Authority (FINRA) Investor Education Foundation and First Nations Development Institute offer this comprehensive analysis of the financial capability of American Indians and Alaska Natives, including their financial behavior, attitudes, and knowledge.

## [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.

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

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