EVENTS

Financial Coaching Fundamentals and Specialty Training on the Web
January–February 2019 (Nationwide)
Change Machine offers regularly scheduled web-based training on financial coaching. The presentations cover financial security fundamentals and specialized topics.

Next Gen Personal Finance FinCamp
January–February 2019 (Nationwide)
Next Gen Personal Finance (NGPF) offers these one-day, professional development workshops for personal finance educators. There is no cost to attend.

Teacher Workshops in Southeastern U.S.
January–February 2019
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.

EITC Awareness Day
January 25, 2019 (Nationwide)
This 12th annual event promotes public understanding of the Earned Income Tax Credit (EITC). The website explains how to participate in EITC Awareness Day and about the availability of free tax preparation sites.

Conversation with the Chair: A Teacher Town Hall Meeting
February 6, 2019 (Nationwide)
The Federal Reserve System hosts this annual event for kindergarten through post-secondary teachers. The Chairman of the Board of Governors of the Federal Reserve System will give opening remarks and take questions from audiences across the country.

America Saves Week
February 25–March 2, 2019 (Nationwide)
The Consumer Federation of America, the American Savings Education Council (ASEC), and America Saves sponsor the annual America Saves Week. The goal is to encourage people, particularly lower-income families, to save money and build wealth. The event offers information and advice on paying down debt, building an emergency fund, and saving for a home, education, and retirement.

NCRC Annual Conference
March 11–13, 2019 (Washington, D.C.)
The National Community Reinvestment Coalition’s annual conference brings together community nonprofits, policymakers, government officials, small businesses, banks, and academia to discuss creating a just economy. NCRC’s National Neighbors Silver initiative will also include the sixth annual Age-Friendly Banking Convening.

Money Smart Week
March 30−April 6, 2019 (Nationwide)
Money Smart Week is a public awareness campaign designed to help consumers better manage their personal finances. Hundreds of organizations across the country—including businesses, financial institutions, schools, libraries, nonprofit groups, government agencies, and the media—come together to stress the importance of financial literacy.

Annual Conference on Financial Education
March 25−27, 2018 (Denver, Colo.)
The Institute for Financial Literacy hosts its Annual Conference on Financial Education. The conference offers professional development and networking opportunities for those involved in financial literacy education.
2019 National Bank On Conference
May 29, 2019 (Washington, D.C.)
The Cities for Financial Empowerment (CFE) 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.

INITIATIVES

2019 High School Student Scholarship Contest
The Utah Jump$tart Coalition sponsors this contest for Utah high school seniors who produce creative, informative YouTube videos about keeping college debt to a minimum. Six students can win a $1,250 scholarship.

2019 Kentucky Saves Week Poster Contest
The Kentucky Jump$tart Coalition sponsors this contest for students in grades 5–8. The theme is the “ABCs of Saving,” and one winner from each grade level will win a $50 prize.

Bank On Capacity Grants
The CFE Fund’s Capacity Grant aims to assist leadership on local Bank On coalitions in expanding banking access. Local Bank On coalitions can apply; applicants should be coalition leaders, from either city or local government agencies, or nonprofit community organizations working in concert with local government. These capacity grants can be as high as $25,000 and are presented on a rolling basis.

Bank On Startup Grant
The CFE Fund’s Bank On Startup Grant supports new or newly re-launched Bank On coalitions in laying the foundation and developing the necessary infrastructure for coalition success. These capacity-building grants support local coalitions in the adoption of the Bank On National Standards and in launching or re-launching local Bank On initiatives. The CFE Fund will make grants of up to $5,000 on a rolling basis.

Foundation for Financial Planning Grant Opportunity
The Foundation for Financial Planning is accepting grant applications from nonprofit organizations whose programs link pro bono financial planners to people in need. The programs should include one-on-one engagements between pro bono clients and planners, and they should be scalable, replicable, and sustainable. The grants range from $5,000 to $40,000, and applications should be submitted from January 15 to April 30, 2019.

Get Back to Class with the SIFMA Foundation
The SIFMA Foundation’s Invest It Forward financial education and capital markets literacy initiative connects educators and classrooms with financial industry professionals and firms to promote youth financial capability across the U.S.

LifeSmarts Online Consumer Challenge
The National Consumers League hosts LifeSmarts, an online competition open to all students in grades 6–12. This September, LifeSmarts celebrates 25 years of 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, technology, and the environment. Students compete online and in person throughout the year to win scholarships and prizes. Experts in LifeSmarts subject areas are also needed to serve as judges and officials at the state and national competitions.

RESOURCES

2017 Federal Deposit Insurance Corporation (FDIC) National Survey of Unbanked and Underbanked Households
The FDIC released the results of its biennial survey of unbanked and underbanked households.

AARP–Small Business Administration Webinars
The 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.

Big Data on Small Savings
EARN and Commonwealth offer this report on the results of their prize-linked savings initiative.
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.

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 MyMoney Five, a research clearinghouse with information and games focused on youth and a section on disaster recovery tools.

The Present and Future of Bank On Account Data: Pilot Results and Prospective Data Collection
The Cities for Financial Empowerment Fund, in partnership with the Federal Reserve Bank of St. Louis, offer this data on 2017 Bank On Account usage at four pilot institutions. This report discusses the relevant account data that can be collected, how it might be collected, and what it might show. The report also highlights the benefits of a central reporting system for financial institutions with Bank On certified accounts and for their coalition partners across the country.

This report from the FTC provides information about scams that target older adults and what the FTC is doing about fraud against older adults.

OCC Financial Literacy Resource Directory
The Office of the Comptroller of the Currency (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.

Managing Someone Else’s Money
The BCFP offers these guides for financial caregivers. The site also offers a video that shares experiences of two caregivers helping a loved one manage their 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.

Glossary of English-Spanish Financial Terms
The Bureau of Consumer Financial Protection has updated its Spanish glossary of financial terms.

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.

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.

Lifting the Weight: Solving the Consumer Debt Crisis for Families Communities and Future Generations
The Aspen Institute’s Expanding Prosperity Impact Collaborative offers this report that identifies options for reducing consumer debt.

eFAFSA
The 2019–20 Free Application for Federal Student Aid (FAFSA) form launched on October 1, 2018. This year, students can fill out the FAFSA form using the new myStudentAid app and the redesigned fafsa.gov website. Please encourage students to spend time on their phones! In addition to the new app, the fafsa.gov website was redesigned so the site’s pages fit the screen size and shape of any device, including desktop or laptop computers and mobile devices.

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**Build Your STAX Online Investing Game**
Next Gen Personal Finance offers this game that allows students to chart their investment strategy over a 20-year period and see how their results stack up against their classmates and “the market.”

**U.S. Financial Health Pulse**
The Center for Financial Services Innovation (CFSI) offers this report on research designed to track the financial health of Americans over time.

**When I’m 65 Documentary and National Engagement Program**
When I’m 65 is a national documentary and multi-year engagement program exploring how our financial and lifestyle choices today affect the whole of our lives. The website also offers toolkits for individuals and educators on a variety of financial issues.

**Youth Financial Education Website**
The BCFP has updated its youth financial education website.

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**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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