

The Office of the Comptroller of the Currency (OCC)'s **Financial Literacy Update** is a bimonthly e-newsletter that reports upcoming events, new initiatives, and related resources of the OCC and other government agencies and organizations. The **Financial Literacy Update** provides brief descriptions for upcoming events in chronological order. New initiatives and resources are listed in alphabetical order. Visit www.occ.gov/flu for more information. We welcome your feedback.

[□Events](#) [□Initiatives](#) [□Resources](#)

EVENTS

[Financial Coaching Fundamentals and Specialty Training on the Web](#) **January–February 2020 (Online)**

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.](#) **January–February 2020 (Various Locations)**

The Federal Reserve Bank of Atlanta sponsors teacher workshops and events online and in Alabama, Florida, Georgia, Louisiana, Mississippi, and Tennessee. These events cover a variety of financial capability and economics topics.

[Virtual Professional Development for Personal Finance Teachers](#) **January–February 2020 (Online)**

Next Gen Personal Finance offers this one-hour video call with teachers around the world. The interactive, collaborative professional development training includes personal finance content, differentiation strategies, and resources for the classroom.

[EITC Awareness Day 2020](#) **January 31, 2020 (Nationwide)**

This 14th 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.

[America Saves Week](#) **February 24–29, 2020 (Nationwide)**

This national event brings together organizations to encourage individuals and families from diverse economic backgrounds to successfully save. Participating organizations are provided with content, resources, and events to share with their respective communities.

Save the Date! [Montana Financial Education Coalition](#)

February 25, 2020 (Helena, Mont.)

The Montana Financial Education Coalition sponsors this annual conference. The conference aims to strengthen partnerships, impart best practices, provide workshops for practical instruction for implementation, and host a resource fair.

Save the Date! [National Interagency Community Reinvestment Conference](#)

March 9–12, 2020 (Denver, Colo.)

Plan now to attend the 2020 National Interagency Community Reinvestment Conference (NICRC) at the Sheraton Denver Downtown Hotel. The NICRC is the premier conference for community development professionals, featuring Community Reinvestment Act compliance training, thought leadership on emerging trends and issues, and tours highlighting on-the-ground success stories in local communities. The conference is sponsored by the Office of the Comptroller of the Currency; the Federal Reserve Banks of San Francisco, Chicago, and Kansas City; the Federal Deposit Insurance Corporation; and the Board of Governors of the Federal Reserve System.

[Annual Conference on Financial Education](#)

March 23–25, 2020 (New Orleans, La.)

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.

[Military Saves Month](#)

April 2020 (Nationwide)

This national event brings together organizations to encourage military service members and their families to successfully save, despite the challenges and obstacles this community faces.

[Money Smart Week](#)

April 4–11, 2020 (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.

[NCRC Just Economy Conference](#)

April 27–29, 2020 (Washington, D.C.)

The National Community Reinvestment Coalition’s annual conference brings together community nonprofit groups, policymakers, government officials, small businesses, banks, and academia to discuss creating a just economy.

[\\$tart \\$mart Teacher Summit](#)

June 19, 2020 (Salt Lake City, Utah)

The Utah Jump\$mart Coalition hosts this summit for educators, who will receive in-depth training on a variety of financial and economic literacy topics.

INITIATIVES

[Financial Education Programs](#)

Registration for all American Bankers Association Foundation financial education programs is open. Bankers who register for participation in these national bank driven initiatives receive access to presentation materials and outreach tools.

[Financial Planning Grants](#)

The Foundation for Financial Planning is accepting grant applications from nonprofit organizations whose programs link pro bono planners to people in need. Programs should include one-on-one engagements between Certified Financial Planner professionals and pro bono clients, be scalable, replicable, and sustainable. Grants are generally in the range of \$5,000 to \$40,000, and applications must be submitted from January 15–April 30, 2020.

[Veterans Benefits Banking Program](#)

The U.S. Department of Veterans Affairs (VA), in partnership with the Association of Military Banks of America, provide veterans and their beneficiaries the opportunity to safely, reliably, and inexpensively receive and manage their VA monetary benefits through financial services at participating banks.

RESOURCES

[AchievABLE Corner](#)

The National Disability Institute and CalABLE offer just-in-time financial education resources and tools for potential and current CalABLE account holders.

[Age-Friendly Banking and Low- to Moderate-Income Older Adults: Standards for a Growing Market](#)

This report from the National Community Reinvestment Coalition addresses the core features and standards of personal age-friendly banking accounts that allow older adults to remain banked and secure, weather financial emergencies, and save money.

[Consumer.gov](#)

This Federal Trade Commission website provides 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.

[FDIC Deposit Insurance Education Materials](#)

The Federal Deposit Insurance Corporation 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 Scams Targeting Military Consumers](#)

This infographic from the American Bankers Association Foundation and the Association of Military Banks of America identifies the top three riskiest scams targeting military consumers and what consumers can do to protect their money.

[FinEdLink](#)

This American Bankers Association Foundation online portal connects schools, agencies, faith-based ministries, senior centers, and other programs with local bankers who are ready to lead financial education workshops.

[Focus on Native Communities Guide](#)

This guide from the Consumer Financial Protection Bureau provides organizations with information that meaningfully connects the Bureau's Your Money, Your Goals guides to the financial lives of Native community members.

[IdentityTheft.gov](#)

This Federal Trade Commission website helps people report and recover from identity theft. It is available in Spanish at Robodeidentidad.gov.

[Misadventures in Money Management](#)

The Consumer Financial Protection Bureau's Office of Servicemembers Affairs offers this gamified, cutting-edge learning experience that trains current and future servicemembers to navigate financial land mines in a fun and interactive way.

[MoneySKILL](#)

The American Financial Services Association Education Foundation offers this online personal finance curriculum with 37 modules focused on a variety of topics, including income, expenses, saving and investing, credit, and insurance. The curriculum is available in Spanish.

[MyCreditUnion.gov](#)

The National Credit Union Administration's official consumer protection website, MyCreditUnion.gov, offers 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 website provides financial education information and resources from across the federal government. The website highlights MyMoney Five (which provides links to resources and tools related to five principles for managing money), a research clearinghouse, games for youth focused on money, and a section on financial choices for major life events.

[NGPF Arcade](#)

Next Gen Personal Finance offers seven online games that make personal finance come alive for middle and high school students.

[OCC Financial Literacy Resource Directory](#)

The 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.

[Older Americans Benchmarking Report](#)

This report presents findings from the American Bankers Association Foundation's 2019 Older Americans Benchmarking Survey which is designed to capture data on how banks educate older Americans, respond to fraudulent activity, and train their staffs to protect older customers.

[Program for International Student Assessment: Financial Literacy Brief](#)

This Consumer Financial Protection Bureau research brief helps stakeholders understand how the Program for International Student Assessment (PISA) financial literacy data about the United States may be used to identify effective approaches to financial education and better define metrics for success.

[Protecting Older Consumers 2018–2019: Report of the Federal Trade Commission](#)

This Federal Trade Commission report identifies scams perpetrated on older Americans and suggests steps to protect older consumers from fraud.

[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.

[Tax Time: An Opportunity to Start Small and Save Up](#)

This Consumer Financial Protection Bureau report discusses the results of the Tax Time Savings Initiative for the 2019 tax season.

[Too Good to Be True Video](#)

The U.S. Securities and Exchange Commission's Office of Investor Education and Advocacy and Retail Strategy Task Force created this video, which shows common scamming tactics.

[U.S. Financial Health Pulse: 2019 Trends Report and Interactive Web Site](#)

This report from the Financial Health Network gives new insights into the financial health of Americans and offers financial services providers, innovators, policymakers, and researchers actionable insights to improve financial health for all. The [interactive website](#) allows visitors to compare year-over-year trends and data.

[Without a Trace](#)

The U.S. Securities and Exchange Commission's Office of Investor Education and Advocacy and Retail Strategy Task Force created this video, which urges skepticism when paying for investments with a credit card or wiring money abroad.

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

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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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