

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.

Online versions of *Financial Literacy Update* are available at www.occ.gov/flu.

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

EVENTS

[2016 Summer Teacher Workshop Series in Kansas City](#)

July–August 2016 (Kansas City, Mo.)

The Federal Reserve Bank of Kansas City offers its 2016 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 Coaching Fundamentals and Specialty Training on the Web](#)

July–August 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.](#)

July–August 2016

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

[2016 Credit Builders Alliance Credit Building Symposium in Washington](#)

July 13–14, 2016 (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.

['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.

['Economics Across the Curriculum' Course in Philadelphia](#)

August 2–4, 2016 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia and the American Institute for Economic Research sponsor this three-day professional development course for high school teachers. The course covers numerous instructional strategies and assessment methods, as well as how to actively engage students to ensure knowledge retention.

[2016 NFCC Connect Conference in Washington](#)

September 25–28, 2016 (Washington, D.C.)

The National Foundation for Credit Counseling sponsors this annual conference, which provides an opportunity to learn and connect with industry colleagues. This year's theme is "Building Brighter Financial Futures."

2016 Assets Learning Conference in Washington

September 28–30, 2016 (Washington, D.C.)

The Corporation for Enterprise Development (CFED) sponsors this event that brings together more than 1,300 stakeholders for three days of intensive capacity-building workshops, plenary sessions, round tables, and receptions.

Council for Economic Education's National Conference in Arizona

October 5–8, 2016 (Phoenix, Ariz.)

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.

EntreEd Forum in Alabama

October 7–10, 2016 (Mobile, Ala.)

The Consortium for Entrepreneurship Education sponsors this forum that provides information for K–12 entrepreneurship educators. Forum topics include maker spaces, business model canvas, and best practices from teachers across the country.

Financial Literacy Conference in Atlanta

October 17–18, 2016 (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.

Get Smart About Credit Day

October 20, 2016 (Nationwide)

The American Bankers Association (ABA) Community Engagement Foundation sponsors this event to teach young people the ABCs of wise credit use. The ABA provides bankers with tools and resources to go into classrooms, connect with youth groups, and visit college campuses and high schools to help young people learn how to budget for college, use credit responsibly, build a positive payment history, and protect their identity. The program is open to all banks, including non-ABA members.

National Educator Conference in Texas

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.

2016 Annual Research and Training Symposium in Kentucky

November 16–18, 2016 (Louisville, Ky.)

The Association for Financial Counseling and Planning Education (AFCPE) hosts this conference for personal finance professionals working in research, practice, and educational settings.

INITIATIVES

2016–2017 Lights, Camera, Save! Video Contest

The ABA Community Engagement Foundation and Discover Debt sponsor this video contest for banks to encourage teenagers to educate themselves and their peers about the value of saving and using money wisely. Banks host local competitions and select winners to compete in a national competition.

BankSafe Initiative

AARP’s BankSafe initiative seeks to empower financial institutions and the aging network to protect consumers from financial exploitation and keep retirement savings safe. AARP will award five \$10,000 innovation grants to local coalitions to help prevent exploitation. Applications are due by August 1, 2016.

Children’s Savings Account Peer Network

The National League of Cities, through its Institute for Youth, Education, and Families announces this opportunity for cities to participate in a peer network focused on sharing information related to planning, developing, and implementing city-led children’s saving accounts programs. Letters of interest must be submitted by July 15, 2016. Please contact Jamie Nash at nash@nlc.org with questions.

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. Teams with the highest online scores advance to state competitions in the early spring, and the winning teams advance to the National Championship, to be held April 22–25, 2017.

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.

[ABA Foundation Book Award Program](#)

The ABA Foundation Book Award Program helps banks promote financial education-themed reading by putting books directly in the hands of students. The “Reading Pays” book poster encourages students to see how many books on the list they can read over the summer.

[Access to Capital and Credit in Native Communities](#)

The Native Nations Institute offers this report on access to capital and credit in American Indian, Alaska Native, and Native Hawaiian communities. The report was commissioned by the U.S. Department of the Treasury’s Community Development Financial Institutions Fund (CDFI Fund) and examines recent successes in the effort to improve access to capital and credit in Native communities, as well as what can be done to build on that success.

[Building Native Communities: Financial Skills for Families](#)

First Nations Development Institute and First Nations Oweesta Corporation offer the fifth edition of this culturally appropriate financial education for Native communities.

[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.

[8 Ways to Measure Financial Health](#)

The Center for Financial Services Innovation (CFSI) offers this guide that gives banks, credit unions, financial technology companies, and nonprofits a way to track consumer financial health and well-being.

[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](#)

The Federal Reserve Bank of Philadelphia offers this program that shows how the Federal Reserve affects everyday life. The DVD consists of seven chapters that discuss the purpose and functions of the Federal Reserve System, including an overview of the history of central banking in the United States, “Money, and Banking 101,” and more.

[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.

[Financial Avenue](#)

Inceptia, a division of the National Student Loan Program, offers this e-learning financial literacy curriculum developed in accordance with the U.S. Department of the Treasury’s Financial Literacy and Education Commission’s financial education core competencies.

[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.

[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 54 lessons designed to help teach students personal finance using active and collaborative learning. “Keys to Financial Success” is offered free to schools and teachers.

[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.

[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.

[Summer Jobs Connect: Connecting Youth to Developmental and Financial Goals](#)

The Cities for Financial Empowerment Fund (CFE Fund) offers this research brief that details results from its Summer Jobs Connect program.

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 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.

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