

The Office of the Comptroller of the Currency (OCC)'s **Financial Literacy Update** is a bimonthly e-newsletter that reports financial literacy events, initiatives, and related resources of the OCC and other government agencies and organizations.

Financial Literacy Update provides brief descriptions and Web links for events in chronological order. It lists 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.

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

EVENTS

[2014 Children's Savings Conference in Washington, D.C.](#)

April 29–30, 2014 (Washington, D.C.)

CFED sponsors this convening of stakeholders from the fields of asset building, education, and finance to explore recent innovations and discuss strategies and opportunities to expand access to, and the availability of, children's savings programs.

[Center for Entrepreneurship and Economic Education Events in St. Louis](#)

March–April 2014

The Center for Entrepreneurship and Economic Education (CEEE) at the University of Missouri–St. Louis addresses the vital need for economic literacy by contributing to the understanding of economics, personal finance, and entrepreneurship through education and outreach to children and adults.

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

March–April 2014

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

[KC MOST Teacher Workshops in Kansas City](#)

March–April 2014 (Kansas City, Mo.)

The Federal Reserve Bank of Kansas City is offering these monthly workshops to help teachers gain a deeper knowledge of key economic and personal finance concepts and receive state-curriculum-based lessons and resources tied to those concepts.

[2014 National Consumer Protection Week](#)

March 2–8, 2014 (Nationwide)

The Federal Trade Commission (FTC), other federal agencies, and nonprofit organizations sponsor this event. The event, a Web site, and a blog highlight the importance of consumer education and offer free resources to help consumers protect their privacy, manage credit and debt, avoid identity theft, understand mortgages and other loans, and recognize scams that target consumers.

[Economic Literacy Conference in St. Louis](#)

March 7, 2014 (St. Louis, Mo.)

The University of Missouri–St. Louis sponsors this professional development opportunity for K-12 teachers, featuring multiple sessions related to economics and personal finance that enhance teachers' knowledge and provide practical resources and curriculum demonstrations. The conference is free, but registration is required.

[Financial Literacy Conference in North Dakota](#)

March 27, 2014 (Bismarck, N.D.)

The North Dakota Jump\$tart Coalition sponsors this conference.

[Money Smart Month in Kansas](#)

April 2014 (Kansas)

Money Smart Kansas 2014 is an annual community outreach initiative designed to promote and encourage financial awareness for all ages through classes, workshops, and the delivery of various resources. Financial education providers throughout Kansas coordinate this campaign as an opportunity

for the public to receive financial education information and resources that can assist people in making positive decisions about their finances.

Money Smart Month of Greater Kansas City **April 2014 (Kansas City, Kan.)**

Money Smart Month of Greater Kansas City is an annual community outreach initiative designed to promote and encourage financial awareness for all ages through classes, workshops, and the delivery of various resources. Financial education providers throughout the Kansas City metropolitan area coordinate this campaign as an opportunity for the public to receive financial education information and resources that can assist people in making positive decisions about their finances. It is also a chance for financial education providers to showcase their work and services through a cooperative, concentrated approach.

Financial Literacy Summit 2014 in Chicago **April 2, 2014 (Chicago, Ill.)**

The Federal Reserve Bank of Chicago and Visa sponsor this conference, which brings together senior financial literacy experts from government, the financial services industry, nongovernmental organizations, the news media, and academia to discuss potential ways to improve financial literacy for the unbanked and underbanked.

Nationwide Money Smart Week **April 5–12, 2014 (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.

Jump\$Start Annual Awards Dinner and General Partner Meeting **April 8–9, 2014 (Washington, D.C.)**

The Jump\$Start Coalition for Personal Financial Literacy hosts its Annual Awards Dinner on April 8, followed by the general partner meeting on April 9. See the Web site for more details.

Teaching Financial Fitness in Connecticut **April 9, 2014 (Southbury, Conn.)**

The Connecticut State Department of Education sponsors this conference for teachers.

Annual Conference on Financial Education in New Orleans **April 9–11, 2014 (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. Participants learn about current trends, best practices, and ways to promote financial education.

National Teach Children to Save Day 2014 **April 11, 2014 (Nationwide)**

Teach Children to Save, a program sponsored by the American Bankers Association Education Foundation, brings together students and bankers to promote savings education. The foundation invites bank volunteers to visit classrooms and share information with students about fundamental money skills.

Financial Fitness Greater Austin **April 21–28, 2014 (Austin, Texas)**

Financial Fitness Greater Austin is a public awareness campaign designed to help consumers better manage their personal finances. Hundreds of local organizations—including businesses, financial institutions, schools, libraries, nonprofit organizations, government agencies, and the media—come together to stress the importance of financial literacy.

Statewide Conference and Resource Fair in Montana **April 28–29, 2014 (Helena, Mont.)**

The Montana Financial Education Coalition sponsors this financial education conference.

5th Annual Fostering Financial Education in Maine Schools **May 8, 2014 (Bangor, Maine)**

The Maine Jump\$Start Coalition for Personal Financial Literacy sponsors this teacher conference.

MoneySmarts for New Hampshire Teachers **May 8, 2014 (Concord, N.H.)**

The New Hampshire Jump\$Start Coalition offers this one-day conference to expand educators' personal financial literacy skills, enhance current curriculums, and advance the use of financial education curriculums in the classrooms.

2nd Annual Household Balance Sheet Research Symposium in St. Louis **May 8–9, 2014 (St. Louis, Mo.)**

The Federal Reserve Bank of St. Louis sponsors this symposium that will feature keynote presentations and commissioned and competitive papers.

Wi\$e Money Week in Jacksonville **May 11–17, 2014 (Jacksonville, Fla.)**

Family Foundations sponsors this week of activities and events celebrating the importance of good money management. The week offers programs and classes, free of charge, to Jacksonville residents.

EMERGE: The Forum on Consumer Financial Services Innovation in Los Angeles

June 4–6, 2014 (Los Angeles, Calif.)

The Center for Financial Services Innovation (CFSI) and American Banker sponsor this conference (formerly the “Underbanked Forum”), which recognizes efforts to develop new terms and a richer understanding of financially underserved consumers’ complex needs and particular challenges in improving their habits of borrowing, spending, saving, and planning for the future.

2014 Tennessee Jump\$tart Coalition Personal Financial Education Teacher Conference

June 25–27, 2014 (Gatlinburg, Tenn.)

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

2014 Assets Learning Conference in Washington, D.C.

September 17–19, 2014 (Washington, D.C.)

CFED sponsors this biennial event that brings together more than 1,200 stakeholders for three days of intensive capacity-building workshops, plenaries, sessions, roundtables, and receptions. This year’s conference will explore Platforms for

Prosperity that move individuals and families from poverty to financial security and economic opportunity. Registration will open in early spring.

Council for Economic Education’s National Conference in Dallas

October 8–11, 2014 (Dallas, Texas)

The Council for Economic Education conference is a nationwide gathering of educators featuring a diverse selection of presentations, workshops, and events to enable educators to raise the level of economic and financial literacy among K-12 students.

INITIATIVES

[Empowerment Awards](#)

Promontory Financial Group offers these awards to recognize promising projects that provide or encourage safe and fair financial services for underserved communities. Applications must be submitted electronically by May 31, 2014.

[Financial Literacy and Education Commission Call for Papers](#)

The Financial Literacy and Education Commission and *The Journal of Consumer Affairs* invite submissions for a special issue, "Starting Early for Financial Success: Capability Into Action." Papers should rigorously explore the connection between financial education and capability interventions and measurable changes in financial behavior and outcomes. The submission deadline is March 16, 2014.

[Iowa MoneySmart Week Poster Contest](#)

The Iowa Jump\$tart Coalition and the Community Bankers of Iowa sponsor this poster contest for students in grades 2-6.

[Measuring the Impact of Financial Capability Programs](#)

NeighborWorks Center for Homeownership Education and Counseling (NCHEC) is offering a new virtual financial capability course. Presented in real time, the four-week course begins Tuesday, June 3, 2014. Please see the Web site for more information.

[Project 5117](#)

Operation HOPE sponsors this effort to eradicate poverty by building the organization's volunteer base. The volunteers serve as HOPE Corps members, the organization's network of individuals who teach financial self-sufficiency and empowerment in communities where they are needed most. All volunteers receive the necessary training and teaching tools to be effective with students in the classroom, to serve as business role models, or to serve as mentors.

[Save Your Refund 2014](#)

The nonprofit Doorways to Dreams Fund, for the second year, is sponsoring its nationwide sweepstakes to encourage saving at tax time. Beginning this 2014 tax season, all filers age 18 and over who are due a federal tax refund and save a portion of that refund using IRS Form 8888 can enter the promotion to win weekly prizes and a grand prize of \$25,000. Get your organization involved or learn more by signing up for the mailing list on the official Web site.

RESOURCES

[AARP-SBA Webinars](#)

AARP and the U.S. Small Business Administration host webinars and publish previous webinars as part of a series to educate people who want to start a business or expand an existing one.

[Association of Military Banks of America Web Site](#)

The Association of Military Banks of America offers this Web site to connect the military community with the military banking program.

[CFPB New Mortgage Rules](#)

The Consumer Financial Protection Bureau (CFPB) released resources for consumers as part of its campaign to educate the public about the new protections provided by the bureau's mortgage rules. Consumers will find free foreclosure help,

information about how the new rules affect their mortgages, and advice on getting a good mortgage.

[FTC.gov](#)

The FTC has redesigned and relaunched its Web site in recognition of the agency's 100th anniversary. The revised Web site provides better access to information about the FTC and its efforts to protect consumers and promote competition.

[Financial Aid Toolkit](#)

Federal Student Aid (FSA), an office of the U.S. Department of Education, offers this Web site that consolidates FSA resources into a searchable online database intended for use by organizations and individuals who interact with, support, or counsel students and families on making financial preparations for postsecondary education.

[Four Things You Should Know About Health Care Credit Cards](#)

The CFPB offers this blog post about deferred-interest health care credit cards.

[LISC Twin Accounts Case Study](#)

The Center for Financial Services Innovation (CFSI) offers this case study about how the Local Initiatives Support Corporation bundled services and built strategic partnerships to help clients improve their credit, build savings, and begin securing their financial futures.

[MyMoney.Gov](#)

The U.S. Department of the Treasury has redesigned MyMoney.gov, a “one-stop shop” for Americans looking to find financial education information and resources from across the federal government. The Web site highlights MyMoney Five, a research clearinghouse with information and games focused on youth.

[OCC Financial Literacy Resource Directory](#)

The Office of the Comptroller of the Currency’s (OCC) new search function for its Financial Literacy Resource Directory enables more efficient information searches within the directory.

[Probability & Statistics: Modular Learning Exercises](#)

The Actuarial Foundation offers this free curriculum specially designed for accelerated students that keeps students engaged in meaningful activities with problems that introduce them to the

core principles of probabilities and statistics. Students take on the role of an actuary as they help an insurance company estimate the risk of storm activity and calculate potentially costly damages. Each module is classroom-ready with data, discussion questions, practice exercises, worksheets, and detailed instructions on using graphing calculators.

[Rigorous Evaluation of Financial Capability Strategies](#)

This CFPB report offers insights that can be helpful to researchers, practitioners, and funders undertaking or contemplating rigorous research into the effectiveness of financial capability approaches.

[Survey of the States 2014](#)

The Council for Economic Education conducts a comprehensive look into the state of K-12 economic and financial education in the United States, collecting data from all 50 states and the District of Columbia. An interactive version may be found at www.councilforeconed.org/news-information/survey-of-the-states/#companion.

HelpWithMyBank.gov: The OCC's HelpWithMyBank.gov Web site provides answers to approximately 250 commonly asked banking questions. While targeted to customers of national banks and federal savings associations (FSA), the Web site 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. Information is also available in Spanish. A link from HOPE NOW—an alliance of counselors, mortgage companies, and other mortgage market participants—to HelpWithMyBank.gov has been established.

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 Web sites.

MyMoney.gov: MyMoney.gov is the U.S. government's Web site 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 Web site 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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