

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

[Bank On Hampton Roads](#)

September 2016 (Hampton Roads, Va.)

Bank On Hampton Roads offers a free financial makeover, a 10-month financial education program, and one-on-one coaching to improve the financial lives of Hampton Roads residents.

[Art of Debt Management Class in Virginia](#)

September–October 2016 (Norfolk, Va.)

The Up Center offers this free course for people who want to avoid or resolve financial difficulties. The course covers budgeting, credit, and debt management.

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

September–October 2016

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.](#)

September–October 2016

The Federal Reserve Bank of Philadelphia offers teacher training programs.

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

September–October 2016

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

[The Money School Classes in Delaware](#)

September–October 2016 (Delaware)

The Delaware Financial Literacy Institute's Money School offers a variety of financial capability classes at libraries around the state.

[VHDA Homebuyer Class in Virginia](#)

September–October 2016 (Norfolk, Va.)

The Up Center and the Virginia Housing Development Authority (VHDA) offer this free class that explores the home-buying process from start to finish. The class covers personal finances, credit and credit scoring, qualifying and applying for a home loan, choosing the right lender, and what to expect at the loan closing.

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

September–December 2016 (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.

[Is Financial Coach Certification Right for You?](#)

September 13, 2016 (Nationwide)

The Association for Financial Counseling, Planning, and Education (AFCPE) and Sage Financial Solutions sponsor this webinar to discuss the financial coach certification.

What It's Worth: Building More Financially Prosperous Arkansans through Savings and Education

September 13, 2016 (Little Rock, Ark.)

The Federal Reserve Bank of St. Louis Little Rock branch sponsors this event that explores ways to help struggling Americans.

Celebrating 20 Years of Being WISER! in Washington

September 20, 2016 (Washington, D.C.)

Women's Institute for a Secure Retirement (WISER) is celebrating its 20th anniversary with a forum and reception.

Reinventing Our Communities Conference in Philadelphia

September 21–23, 2016 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia sponsors this biennial conference that draws hundreds of community developers and planners, government leaders, bankers, researchers, and foundation representatives from across the country to participate in forward-looking conversations regarding revitalizing communities in equitable and inclusive ways.

Master Financial Educator Volunteer Training in Virginia Beach

September 22–December 1, 2016 (Virginia Beach, Va.)

Virginia Cooperative Extension offers this training for community volunteers interested in conducting personal finance classes or personal finance coaching.

Financial Capability Training for Social Service Professionals in Kansas City

September 23, 2016 (Kansas City, Mo.)

The Federal Reserve Bank of Kansas City sponsors this training for social service organizations that integrate financial capability into services for low- and moderate-income families. The interactive training prepares attendees to use the Consumer Financial Protection Bureau's (CFPB) "Your Money, Your Goals" toolkit and provides foundational information on a variety of financial topics.

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.

National Cyber Security Awareness Month October 2016 (Nationwide)

National Cyber Security Awareness Month is a collaborative effort between government and industry to ensure that every American has the resources to stay safer and more secure online.

Wisconsin Summit on Financial Literacy

October 4, 2016 (Green Bay, Wis.)

The Wisconsin Governor's Council on Financial Literacy, Lakeland College, and Economics Wisconsin host this annual one-day conference to support K–12 teachers, community outreach educators, and those with an interest in enhancing the financial and economic literacy of individuals (young or old) within their community.

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.

Master Your Money: Retirement Security

October 6, 2016 (Virginia Beach, Va.)

The Virginia Beach Central Library hosts this free event for the community. Attendees receive complimentary financial advice from professionals with the Financial Planning Association and may attend workshops on retirement planning, Social Security, and estate planning.

EntreEd Forum in Alabama

October 7–10, 2016 (Mobile, Ala.)

The National 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.

2016 Virginia Financial Literacy Summit

October 10, 2016 (Richmond, Va.)

The Virginia Jump\$tart Coalition sponsors this conference, which brings together Virginia's middle and high school teachers and the state's leading proponents of financial literacy to discuss best practices and provide training on personal finance topics.

Financial Education Boot Camp

October 13, 2016 (Baton Rouge, La.)

The Louisiana Jump\$tart Coalition and the Louisiana Council for Economic Education sponsor this workshop designed to equip Louisiana educators and youth and community development professionals with the knowledge, tools, and classroom resources to teach students to become financially savvy and in control of their financial futures.

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 eighth annual conference offers tools, resources, and support for educators of pre-K–12 students.

Financial Education in Oklahoma Conference

November 10, 2016 (Oklahoma City, Okla.)

The Oklahoma Jump\$tart Coalition sponsors this annual conference.

2016 Educator's Conference in Vermont

November 11, 2016 (Burlington, Vt.)

The Vermont Jump\$tart Coalition sponsors its annual conference.

2016 I'm Home Conference in Texas

November 14–16, 2016 (San Antonio, Texas)

CFED sponsors this conference bringing together affordable housing developers, lenders, government agency staff, 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.

2016 Annual Research and Training Symposium in Kentucky

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

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

Financial Fitness Coach Training in Kentucky

November 19–20, 2016 (Louisville, Ky.)

The AFCPE and Sage Financial Solutions offer this training at the AFCPE Symposium.

Financial Services Conference in Washington

December 1–2, 2016 (Washington, D.C.)

The Consumer Federation of America's 28th annual conference, planned with the assistance of consumer groups and the financial services industry, brings together federal and state policymakers and regulators to discuss banking, insurance, investment, and real estate issues affecting consumers.

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.

[2017 Kentucky Saves Week Poster Contest](#)

The Kentucky Jump\$tart coalition sponsors this contest for Kentucky students in grades 5–8. Posters should reflect the theme “Grow Your Dough.” Submissions will be accepted October 2016 through January 2017.

[FAFSA Filing Now Begins in October](#)

Beginning with the 2017–2018 academic year the Free Application for Federal Student Aid (FAFSA) will be available to students and their families on October 1, 2016.

[Invest It Forward](#)

The Securities Industry and Financial Markets Association (SIFMA) and the SIFMA Foundation sponsor this industry-wide financial education and capital markets literacy campaign convening hundreds of financial firms that are committed to giving young Americans a solid understanding of the capital markets system and the invaluable tools to achieve their dreams.

[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.

[Student Essay Contest](#)

The Federal Reserve Bank of Minneapolis announces the 29th annual student essay contest, which is open to all high school students in the Ninth Federal Reserve District.

RESOURCES

[AARP Foundation Finances 50+](#)

The AARP Foundation is looking for volunteers to present this financial capability program designed to motivate and empower those 50 and older to take charge of their financial futures. Volunteers receive training and materials to conduct the workshops. The materials are available in English, Spanish, and Chinese.

[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.

[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.

[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.

[FTC Mobile-Friendly Videos Help Consumers Shop for Cars](#)

The Federal Trade Commission (FTC) offers these 60-second videos to help consumers with the car-buying process. The mobile-friendly videos are available in English and Spanish.

[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.

[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.

[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 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.

[Protecting the Financial Security of Older Americans](#)

The ABA offers this toolbox designed to help banks establish financial programming specific to the needs of their older customers.

[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 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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