



Comptroller of the Currency
Administrator of National Banks
US Department of the Treasury

Financial Literacy Update

May/June 2012

COMMUNITY AFFAIRS

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](#)

UPCOMING EVENTS

[Money Smart Study](#)

Nationwide

The Federal Deposit Insurance Corporation (FDIC) is evaluating how its Money Smart for Young Adults curriculum helps students handle money. The FDIC is seeking help from organizations planning to use the curriculum for students from ages 14 to 18. Selected organizations provide feedback and have their students take pre- and post-training surveys. Selected organizations receive a stipend for participating. To learn more, visit the FDIC's Money Smart Web site, e-mail communityaffairs@fdic.gov, or call (800) 287-1581.

[Teacher Workshops, Events in Southern U.S.](#)

May–July 2012

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

[Kentucky Jump\\$tart Teacher of the Year](#)

May 1, 2012 (Statewide)

The Kentucky Jump\$tart Coalition will honor a Kentucky teacher for kindergarten through 12th grade who demonstrates exceptional commitment to teaching financial literacy topics and motivating students to learn about personal finance. The winner receives a \$250 cash award. The deadline to enter is May 1.

[MoneyWi\\$e Week Jacksonville, Fla.](#)

May 7–11, 2012 (Jacksonville)

The First Annual Jacksonville MoneyWi\$e Week offers programs, classes, and activities for all ages and income levels and is designed to help consumers better manage their personal finances.

[MoneySmarts for New Hampshire Teachers](#)

May 9, 2012 (Concord)

The New Hampshire Jump\$tart 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 classrooms.

[24th Annual University of Maryland Extension Personal Finance Seminar for Professionals](#)

May 16–18, 2012 (Annapolis, Md.)

The University of Maryland Extension hosts this three-day conference on consumer spending issues for personal finance professionals.

[Financial Literacy and Education Commission](#)

May 22, 2012 (Washington, D.C.)

The U.S. Department of the Treasury's Financial Literacy and Education Commission is having its next quarterly meeting. The commission represents 21 entities and supports efforts by the government and private sector to promote financial education. The commission coordinates the federal government's financial education efforts; identifies and promotes best practices; promotes the National Strategy for Financial Literacy; and manages the MyMoney.gov Web site.

[Exploring Economics: Workshop for Secondary Teachers in Louisiana](#)

June 5, 2012 (Hammond, La.)

The Federal Reserve Bank of Dallas sponsors this workshop to help teachers integrate economic concepts into classroom instruction.

[Tennessee Jump\\$tart Personal Financial Education Teacher Conference](#)

June 6–8, 2012 (Gatlinburg, Tenn.)

Tennessee Jump\$tart hosts this annual personal finance conference for educators. The conference fulfills the employment requirement for secondary school educators who teach Tennessee's required high school personal finance course.

[7th Annual Underbanked Financial Services Forum](#)

June 13–15, 2012 (San Francisco, Calif.)

The Center for Financial Services Innovation and *American Banker* host this forum, which offers sessions on credit, payments, and deposits. The forum explores how to spur innovation through opportunities for the financial services marketplace to create value for the industry while also making people's lives better. The forum highlights groundbreaking innovations and showcases efforts by leading financial services providers to help underserved consumers move toward financial prosperity.

[Jump\\$tart Financial Literacy Luncheon in Alabama](#)

June 13, 2012 (Birmingham, Ala.)

The Federal Reserve Bank of Atlanta's Birmingham branch and the Alabama Jump\$tart Coalition sponsor this luncheon for school administrators and educators to explore financial education topics for the classroom. The lunch is free, and registration is on a first-come, first-served basis.

[Personal Finance Training for Teachers in Tennessee](#)

June 14–15, 2012 (Chattanooga)

June 21–22, 2012 (Cookeville and Knoxville)

June 27–28, 2012 (Huntingdon and Jonesborough)

July 11–12, 2012 (Nashville)

September 27–28, 2012 (Knoxville)

The University of Tennessee Extension hosts a two-day workshop to help educators learn more about personal finance and obtain resources to help them teach personal finance effectively. The program satisfies the 14 hours of training required by the Tennessee Department of Education for those who teach personal finance in high schools.

[Economics Boot Camp in Texas](#)

June 18–20, 2012 (Houston)

July 17–19, 2012 (Dallas)

July 25–27, 2012 (San Antonio)

August 8–10, 2012 (El Paso)

The Federal Reserve Bank of Dallas presents four three-day workshops that provide economics teachers training in course-specific content. The workshop is designed for teachers with little or no economics experience.

[Advanced Placement Economics in Missouri](#)

June 20–22, 2012 (St. Louis, Mo.)

The Federal Reserve Bank of St. Louis sponsors this three-day workshop, which demonstrates engaging economics lessons, interactive online programs, and whiteboard applications developed specifically for Advanced Placement classes.

[Texas Workshops: U.S. History Through an Economic Lens](#)

June 21–22, 2012 (Houston)

August 2–3, 2012 (Dallas)

The Federal Reserve Bank of Dallas presents two two-day workshops that incorporate economic concepts into U.S. history courses.

[National Training for Teachers](#)

June 25–28, 2012 (Tucson, Ariz.)

The Family Economics and Financial Education (FEFE) hosts this three-day national training conference for Arizona teachers. The conference provides educators with interactive workshops, modeling lesson plan activities, and ready-to-teach curriculum materials.

[Making Sense of Money and Banking, a Philadelphia Workshop for Teachers](#)

July 16–20, 2012 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia sponsors this five-day workshop, which covers money, banking and the Federal Reserve System. Emphasis is placed on active- and collaborative-learning teaching methods and curriculums for teaching money and banking in K-12 classrooms. Participants must attend all five days and will earn professional development credit.

[East Coast Educator Training](#)

July 30–August 1, 2012

Family Economics and Financial Education (FEFE) hosts this three-day training conference to provide Maryland educators with interactive workshops, model lesson planning activities, and ready-to-teach curriculum materials.

[Lessons, Activities for Texas Teachers' Interactive Whiteboards](#)

August 1, 2012 (Dallas, Texas)

August 15, 2012 (San Antonio, Texas)

The Federal Reserve Bank of Dallas sponsors these one-day conferences for teachers with access to interactive whiteboards in their classrooms. New interactive content focuses on economics and personal finance instruction.

[Summer Educator Conference in Arkansas](#)

August 7, 2012 (Little Rock, Ark.)

The Arkansas JumpStart Coalition sponsors this conference, which includes presentations from coalition members and culminates with a live, video presentation from Federal Reserve Chairman Ben Bernanke on the importance of personal financial education.

[Financial Literacy Leadership Conference in Washington, D.C.](#)

October 15–16, 2012 (Washington, D.C.)

The Society for Financial Education and Professional Development hosts this fifth annual Financial Literacy Leadership Conference. The theme is Financial Literacy: A Tool. Attendees will gain important information and strategies for enhancing financial literacy of Americans.

[Nationwide Get Smart About Credit Day 2012](#)

October 18, 2012 (Nationwide)

The American Bankers Association Education Foundation sponsors this event to connect bankers with students and other young adults. The goal is to help participants better understand credit and use credit responsibly.

NEW INITIATIVES

[Money as You Grow](#)

Created by Beth Kobliner, a member of the President's Advisory Council on Financial Capability, this Web site encourages families to talk about money and identifies 20 money milestones for children from pre-kindergarten through college.

[Ready.Save.Grow.](#)

The U.S. Department of the Treasury offers Ready.Set.Grow, a public education campaign that encourages Americans to use U.S. Treasury securities as a safe and convenient way to save.

NEW RESOURCES

[4-H Build a Million Club](#)

This program offered by eXtension is designed to educate youth on the ins and outs of investing, budgeting, credit cards, stocks, and many other aspects of personal finance.

[Credit Score Quiz, en Español](#)

The Consumer Federation of America and VantageScore offer the Credit Score Quiz in Spanish so consumers can test their knowledge of credit scores. The site also offers useful information about credit reports.

[AARP Social Security Benefits Calculator](#)

AARP offers this free calculator to estimate Social Security benefits and to help determine the best time to claim Social Security benefits. The calculator is also available in Spanish.

[Financial Workshop Kits](#)

Created by the National Endowment for Financial Education (NEFE), the Financial Workshop Kits contain information needed to create engaging and meaningful financial education programs.

[FINRA Broker Check](#)

BrokerCheck is a free tool to help investors research the professional backgrounds of current and former FINRA-registered brokerage firms and brokers. FINRA is the Financial Industry Regulatory Authority, the regulator for securities firms doing business in the United States.

[MyMoney.Gov](#)

MyMoney.gov is the U.S. government's Web site dedicated to teaching all Americans the basics about financial education.

[My Classroom Economy](#)

Vanguard Group's curriculum enables educators to teach financial responsibility through fun, experiential learning.

HelpWithMyBank.gov: The OCC's HelpWithMyBank.gov Web site provides answers to approximately 250 commonly asked banking questions. While targeted to customers of national bank and federal savings associations (collectively, banks), the Web site has answers to many questions common to bank consumers and provides useful information about contacting regulators of state banks, thrifts, 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 Web directory includes descriptions of, and contact information for, government programs on financial literacy education and capability, 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.

Subscribe/Unsubscribe: Sign up for the OCC's "Financial Literacy Updates" by visiting the [OCC's Web site](#).

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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