



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

# Financial Literacy Update

July/August 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](mailto:communityaffairs@occ.treas.gov).

Online versions of **Financial Literacy Update** are available at [www.occ.gov/flu](http://www.occ.gov/flu).

■ **Upcoming Events** ■ **New Initiatives** ■ **New Resources** ■ **Updates**

## UPCOMING EVENTS

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

**July 2012 (Southeastern United States)**

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

### [Investor Education, Economics, and Insurance Teacher Training in Wisconsin](#)

**July 9–13, 2012 (Madison)**

The National Institute of Financial and Economic Literacy offers its 12<sup>th</sup> annual summer series with several sessions. This session covers saving and investing as a means to financial security and a wealth-building strategy. Attendees also gain knowledge and skills on making informed investment decisions for themselves as well as their students. Attendees may also earn three graduate credits.

### [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.

### [Economics Boot Camp in Texas](#)

**July 17–19, 2012 (Dallas)**

**July 25–27, 2012 (San Antonio)**

**August 8–10, 2012 (El Paso)**

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

### [EconFest 2012 in Missouri](#)

**July 18, 2012 (St. Louis)**

The Federal Reserve Bank of St. Louis presents this one-day workshop, which features new lessons that satisfy the Common Core Standards. The lessons are presented in an elementary strand and a middle school strand and focus on biographies, historical fiction, and primary sources.

### [Personal Financial Literacy Conference in Iowa](#)

**July 20, 2012 (Ankeny)**

The Iowa Jump\$tart Coalition sponsors its 12<sup>th</sup> Annual Financial Literacy conference. Check site for details.

[Hard Core Financial Education Boot Camp in New Jersey](#)

**July 24, 2012 (Newark)**

**July 31, 2012 (New Providence)**

The New Jersey Coalition for Financial Education sponsors these one-day interactive workshops, which offer new and advanced skills, activities, and tools to teach personal finance and economics. Professional development credit is available.

[Credit and Money Program Teacher Training in Wisconsin](#)

**July 30–August 3, 2012 (Madison)**

The National Institute of Financial and Economic Literacy offers its 12<sup>th</sup> annual summer series. This session covers budgeting, consumption, credit education, money, and inflation. Attendees may also earn three graduate credits.

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

**July 30 – 31, 2012 (Austin)**

**August 2–3, 2012 (Dallas)**

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

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

**August 1, 2012 (Dallas)**

**August 15, 2012 (San Antonio)**

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.

[Educator Training in Maryland](#)

**August 6–August 8, 2012 (Towson)**

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

[Educator Conference in Arkansas](#)

**August 7, 2012 (Little Rock)**

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.

[Meet the Experts Speaker Series in Western U.S.](#)

**August 7, 2012 (Los Angeles, Calif., Phoenix, Ariz., Portland, Ore., San Francisco, Calif., Salt Lake City, Utah, Seattle, Wash.)**

The Federal Reserve Bank of San Francisco presents this event for middle, high school, and community college educators. Participants interact with representatives from the Federal Reserve Bank and other experts in personal finance and economic education.

[Financial Education Boot Camp in Louisiana](#)

**September 12, 2012 (Baton Rouge)**

**September 14, 2012 (Alexandria)**

The Louisiana JumpStart Coalition sponsors these one-day workshops, which is designed to deliver turnkey curriculum and resources to help educators and youth development professionals teach money management skills to youth.

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

**September 13–14, 2012 (Nashville)**

**September 27–28, 2012 (Knoxville)**

The University of Tennessee Extension these two-day workshops 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.

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

**October 15–16, 2012 (Washington)**

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

[Annual Educators Conference in Four States](#)

**October 23, 2012 (Arkansas, Kentucky, Missouri, and Tennessee)**

The Federal Reserve Bank of St. Louis sponsors this teacher conference at its St. Louis, Mo., Little Rock, Ark., Memphis, Tenn., and Louisville, Ky., locations. Teachers receive engaging lessons for their classrooms and certificates of participation.

## NEW INITIATIVES

### [MyMoneyAppUp Challenge](#)

The U.S. Department of the Treasury is sponsoring this contest to motivate entrepreneurs, software developers, the public, and students to propose ideas and designs for mobile tools. The tools should be designed to help consumers make smart financial choices, access high-quality financial products and services, and control and shape their financial futures.

### [\\$tand By Me](#)

The Delaware Financial Empowerment Partnership offers one-on-one financial coaching in participating workplaces around Delaware.

### [Workplace Financial Education](#)

The National Endowment for Financial Education's (NEFE) workplace initiative provides resources to human resource professionals to help them promote financial education within their organizations.

## NEW RESOURCES

### [2012 Research Questions and Priorities](#)

The Financial Literacy and Education Commission's (FLEC) Research and Evaluation Working Group offers its Research Questions and Priorities for 2012. The purpose of this document is to address the most important research issues facing the financial education field, reduce duplication and overlap in the field, and make the best use of limited research dollars.

### [Every American Financially Empowered](#)

The U.S. President's Advisory Council on Financial Capability offers this resource guide to K-12 schools, institutions of higher education, employers, and community leaders with the goal of inspiring leaders at all levels to leverage partnerships to create their own financial capability initiatives as a means toward building financial well-being for every American.

### [Keys to Financial Success](#)

The Federal Bank of Philadelphia offers this curriculum for teaching personal finance to high school students. Keys to Financial Success comprises 54 lessons emphasizing active and collaborative learning and is offered free to schools and teachers.

### [Know Before You Owe](#)

The Consumer Financial Protection Bureau (CFPB) has developed a financial aid shopping sheet showing how schools might improve the financial information they present to prospective students and their families. The CFPB wants consumers to review the proposed document and provide feedback.

### [Money As You Grow](#)

Money as You Grow, developed by the U.S. President's Advisory Council on Financial Capability, is a new interactive tool that help kids learn the 20 things they need to know about money. The site was launched May 10, 2012, during the first White House Summit on Financial Capability and Empowerment. The Youth Subcommittee of the President's Advisory Council on Financial Capability spent 16 months combing through dozens of the best studies, guidelines, and standards in order to present the most essential money milestones that children need to know as they grow.

### [Saving for a Large Purchase](#)

America Saves' resource packet helps those in the financial literacy field convey important messages to the public and to organizations interested in helping people save for large purchases, such as cars, homes, weddings, vacations, and computers.

**HelpWithMyBank.gov:** The OCC's HelpWithMyBank.gov Web site provides answers to approximately 250 commonly asked banking questions. While targeted to national bank and federal savings associations customers, the Web site has answers to many questions common to all banking and federal savings association 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](mailto:communityaffairs@occ.treas.gov).

The information contained in the Financial Literacy Update was obtained from publicly available sources. Inclusion of a non-OCC event, activity, product, or hyperlink in this e-newsletter does not constitute an endorsement by the OCC. The OCC does not exercise editorial control over any of the information you may find when linking to non-OCC Web sites and cannot guarantee the accuracy of the information.