

The Office of the Comptroller of the Currency (OCC)'s **Financial Literacy Update** is a bimonthly e-newsletter that reports upcoming events, new initiatives, and related resources of the OCC and other government agencies and organizations. The **Financial Literacy Update** provides brief descriptions for upcoming events in chronological order. New initiatives and resources are listed in alphabetical order. Visit www.occ.gov/fltu for more information. We welcome your feedback.

[☐ COVID-19](#) [☐ Events](#) [☐ Initiatives](#) [☐ Resources](#)

COVID-19

[America Saves COVID-19 Resources](#)

American Bankers Association

- [Tips to Avoid Scams and Protect Your Money](#)

Association for Financial Counseling & Planning Education

- [Free Virtual Financial Counseling and Coaching](#)

Commodity Futures Trading Commission

- [Be on Alert for Frauds Seeking to Profit From Market Volatility](#)
- [Beware of Fee Scams Targeting Workers Sidelined by COVID-19](#)

Consumer Financial Protection Bureau

- [Protecting Your Finances During the Coronavirus Pandemic](#)
- [Financial Education Resources for Older Adults, Their Families, and Practitioners During the Coronavirus Pandemic](#)
- [Mortgage and Housing Assistance During the Coronavirus National Emergency](#)

Federal Communications Commission

- [Consumer Warnings and Safety Tips](#)

Federal Deposit Insurance Corporation

- [Coronavirus \(COVID-19\) Information for Bankers and Consumers](#)

Federal Trade Commission

- [Coronavirus Pandemic: The FTC in Action](#)

Financial Health Network

- [Responding to the Crisis](#)

Foundation for Financial Planning

- [Coronavirus and Pro Bono Planning Resource Center](#)

George Washington University Global Financial Literacy Excellence Center

- [COVID-19 Financial Resilience Hub](#)

Internal Revenue Service

- [Coronavirus Tax Relief and Economic Impact Payments](#)

[Military Saves COVID-19 Resources](#)

National Community Reinvestment Coalition

- [Webinar About Older Adults, Banking and Financial Management During COVID-19](#)

National Credit Union Administration

- [COVID-19 Frequently Asked Questions for Credit Union Members](#)

National Disability Institute

- [Financial Resilience Center](#)

National Foundation for Credit Counseling

- [COVID-19 Emergency Financial Help](#)

National Housing Conference

- [COVID-19 Housing Resource Center](#)

Next Gen Personal Finance

- [Resources for Teaching Personal Finance Remotely to Support Virtual Learning This Fall](#)

OCC's HelpWithMyBank

- [Frequently Asked Questions Regarding COVID-19](#)

Operation HOPE

- [HOPE Inside Disaster](#)

U.S. Consumer Product Safety Commission

- [COVID-19 Home Safety Information Center](#)

U.S. Department of Defense

- [Resources for the Military Community](#)

U.S. Department of Education

- [Forbearance Information for Students, Borrowers, and Parents](#)

U.S. General Services Administration

- [Disaster Financial Assistance](#)
- [Government Response to Coronavirus, COVID-19](#)

U.S. Securities and Exchange Commission

- [Frauds Targeting Main Street Investors](#)
- [Look Out for Coronavirus-Related Investment Scams](#)

EVENTS

Credit as an Asset Training

November 2020 (online)

The Credit Builders Alliance, in partnership with the Midwest Asset Building Conference, offers this training designed to help nonprofit, community-based organizations enhance their understanding of credit building as an asset-building strategy.

Virtual Professional Development for Personal Finance Teachers

November–December 2020 (Online)

Next Gen Personal Finance offers interactive, collaborative professional development training, including personal finance content, strategies, and resources for the classroom.

Financial Literacy Seminar Series

November–December 2020 (Online)

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. The seminars are open to the public.

Connecticut Financial Literacy Summit

November 3, 2020 (Online)

The Connecticut Jump\$tart coalition sponsors this annual conference.

Virtual Teacher Workshops in Southeastern U.S.

November–December 2020 (Online)

The Federal Reserve Bank of Atlanta sponsors teacher workshops and events online and in Alabama, Florida, Georgia, Louisiana, Mississippi, and Tennessee. These events cover a variety of financial capability and economics topics.

#ThinkLikeASaver: How Do I Pay Off Debt?

November 5, 2020 (Online)

America Saves and Military Saves host this town hall, which brings together financial experts, influencers, and everyday Americans to share best strategies on paying down debt.

Financial Literacy Conference

November 9–10, 2020 (Online)

The Society for Financial Education and Professional Development hosts the 13th Annual Financial Literacy Leadership Conference, “Financial Strategies for COVID-19 and Economic Disparities.” Participants will receive information and strategies on how financial literacy is being applied to improve the financial well-being of individuals and families.

2020 Research and Training Symposium

November 16–20, 2020 (Online)

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

Econ Resources for Your Classroom

November 17, 2020 (Webinar)

The Federal Reserve Bank of Richmond offers this webinar, which provides education resources for teachers when engaging with students learning about money policy, economic indicators, the Federal Reserve, and more.

21st Century Careers: Opportunity Occupations

November 19, 2020 (Online)

The Federal Reserve Bank of Kansas City sponsors this webinar to help high school students meet career professionals representing a variety of career paths that pay above the annual median wage, don't require a four-year degree, and are poised for significant growth.

#ThinkLikeASaver: Saving for Major Life Milestones

November 19, 2020 (Online)

America Saves and Military Saves host this town hall, which brings together financial experts, influencers, and everyday Americans to shine a spotlight on three major life events—education, homeownership, and retirement. The town hall addresses how to prepare for these events.

Save the Date: America Saves Summit

December 2, 2020 (Online)

This summit, sponsored by America Saves, features representatives from the government, private industry, financial services, academia, the military, the nonprofit sector, and the news media for an in-depth conversation about the current status of saving in the United States.

Financial Services Conference in Washington

December 9–10, 2019 (Online)

The Consumer Federation of America's 33rd 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

2020 U.S. National Strategy for Financial Literacy

The U.S. Financial Literacy and Education Commission's report details the federal government's financial literacy priorities and underscores the commission's plan to collaborate with state, local, and tribal governments and the private sector to strengthen financial capability for all Americans.

Fall 2020 High School Scholarship Competition

The Utah Jump\$tart Coalition will award up to three scholarships to high school students who create videos about financial literacy topics.

LifeSmarts Online Consumer Challenge

The National Consumers League hosts LifeSmarts, an online competition open to all students in grades 6–12. In September, LifeSmarts celebrated 27 years of empowering teens to become smart, savvy consumers. Each month, LifeSmarts focuses on a different category important to teen consumers:

personal finance, health and safety, consumer rights, technology, and the environment. Students compete online and in person throughout the year to win scholarships and prizes. Experts in LifeSmarts subject areas are needed to serve as judges and officials at the state and national competitions.

Pro Bono Planner Match

This Foundation for Financial Planning program helps bring free financial advice and planning to people in need by matching certified financial planner professionals with volunteer opportunities nationwide.

Project REACH

The OCC has launched Project REACH (Roundtable for Economic Access and Change) to bring together leaders from the banking industry, national civil rights organizations, business, and technology to promote financial inclusion through greater access to credit and capital. The initiative seeks to reduce specific barriers that prevent full, equal, and fair participation in the nation's economy.

RESOURCES

[Aging and Financial Decision Making](#)

Research studies from Financial Industry Regulatory Authority's Investor Education Foundation explore the relationships between the aging brain and important outcomes for financial decision making.

[Building Blocks of Youth Financial Capability](#)

The Consumer Financial Protection Bureau offers activities to teach youth financial literacy skills that are designed for use in a single class period for grade levels K-12 and can be integrated into a variety of subject areas.

[Building Valuable Customer Relationships Through Financial Health](#)

The Financial Health Network's report explores how financial institutions can help their customers build financial resilience and strong, sustainable relationships.

[Consumer.gov](#)

This Federal Trade Commission website provides 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 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.

[Federal Agency Strategies for Reducing Elder Fraud](#)

The National Community Reinvestment Coalition's National Neighbors Silver program offers this video with resources for combatting elder fraud.

[Financial inTuition Podcast](#)

The Consumer Financial Protection Bureau's podcast discusses resources that help listeners make more informed financial decisions. The podcast covers a variety of topics, including managing money as a young adult, credit, student loans, and managing debt.

[IdentityTheft.gov](#)

This Federal Trade Commission website helps people report and recover from identity theft. It is available in Spanish at Robodeidentidad.gov.

[Meet the Money Monsters!](#)

The Consumer Financial Protection Bureau recently released a series of five Money Monster stories that focuses on important money concepts, including borrowing, earning, protecting, saving, and spending, to introduce children to ideas, habits, and activities they will need as they grow up and start to manage their own money. Educators and parents can pair the stories with money concept activities to reinforce the message.

[Misadventures in Money Management](#)

The Consumer Financial Protection Bureau offers this financial training for service members on how to avoid financial landmines. The training is presented as an interactive graphic novel.

[MoneySkill](#)

The American Financial Services Association Education Foundation offers this free, online personal finance curriculum. The curriculum has 37 modules focused on a variety of topics, including income, saving and investing, credit, and insurance. The curriculum is available in English and Spanish and is audio-equipped for English users.

[MyCreditUnion.gov](#)

The National Credit Union Administration's official consumer protection website, MyCreditUnion.gov, offers 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 website provides financial education information and resources from across the federal government. The website highlights MyMoney Five (which provides links to resources and tools related to five principles for managing money), a research clearinghouse, games for youth focused on money, and a section on financial choices for major life events.

[NGPF Video Library](#)

Next Gen Personal Finance offers a library of personal finance videos.

Resources for Older Americans

The Consumer Financial Protection Bureau's Office for Older Americans provides a variety of resources, including placemats, handouts, and activity sheets to help older adults and their families avoid scams.

OCC Financial Literacy Resource Directory

The 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. It also includes organizations whose missions are to support financial literacy through campaigns, fact sheets, newsletters, conference materials, publications, and websites.

Race, Ethnicity, and the Financial Lives of Young Adults

The Financial Health Network's report shares data on the financial lives of young adults, focusing on Black and Latinx young adults, to inform policies, programs, and solutions that can improve financial health for all.

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 help investors reach 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.

What Banks Need From Their Technology 'Stack' to Support Consumer Financial Health

The Financial Health Network's report discusses how, despite having a wealth of customer data, many financial institutions lag behind financial technology firms in providing solutions to improve consumer financial health. The report explores the current landscape and opportunities to help institutions overcome these barriers to power effective financial health, or finhealth, tools.

HelpWithMyBank.gov: The OCC's HelpWithMyBank.gov website provides answers to commonly asked banking questions. While targeted to customers of national banks and federal savings associations, the website has answers to many questions common to all consumers of banking services 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 with the OCC.

Subscribe/unsubscribe: Sign up for the OCC's *Financial Literacy Update* by visiting www.occ.gov/emallist.

Have an upcoming financial literacy event worth noting? Rolling out a new financial literacy initiative? Developing a new tool or product? Have general feedback? Email us at communityaffairs@occ.treas.gov.

The information in the *Financial Literacy Update* was obtained from publicly available sources. Inclusion of a non-OCC event, activity, product, or hyperlink in this 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 websites and cannot guarantee the accuracy of the information.