

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.

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EVENTS

[AARP Webinars](#)

May–June 2013 (Online)

AARP offers a schedule of upcoming webinars on a variety of financial capability topics. The Web site also offers archived webcasts and resources.

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

May–June 2013

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

[MoneySmarts for New Hampshire Teachers](#)

May 9, 2013 (Concord, N.H.)

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 the classrooms.

[Central Florida Investor Fraud Summit](#)

May 15, 2013 (Orlando, FL)

Florida A&M University offers this summit to inform the public about fraud. Featured topics include common fraud schemes, investment schemes, and fraud trends in Central Florida. Speakers will include Federal and State Law Enforcement Representatives and Financial Regulatory Authorities. Please call (407) 648-7569 to register.

[Personal Finance Seminar for Professionals](#)

May 15–17, 2013 (Annapolis, Md.)

University of Maryland Extension presents the 25th Annual Personal Finance Seminar for Professionals. Personal finance experts and high-ranking officials from federal agencies and commissions share practical strategies and discuss personal finance issues.

[National Economics Challenge in New York](#)

May 18–19, 2013 (New York, N.Y.)

The Council for Economic Education sponsors this national competition to foster interest in economics among high school students.

[Economic Education in Missouri and Kentucky](#)

June–July 2013 (St. Louis, Mo., and Louisville, Ky.)

The Federal Reserve Bank of St. Louis offers economic education for teachers.

[Assets for Independence Grant Deadlines](#)

June 7, 2013 (Nationwide)

The U.S. Department of Health and Human Services Office of Community Services administers the Assets for Independence (AFI) program, which provides five-year grants to nonprofit organizations and government agencies that empower low-income families to become economically self-sufficient for the long term. Grantees provide financial education training on money management issues and assist participants with saving earned income in individual development accounts. Eligible applicants include nonprofit organizations, qualified state and local governments, low-income designated credit unions, community development financial institutions (CDFIs), and other community organizations. Applications for AFI grants of up to \$1 million are being accepted until June 7, 2013.

[Economic Education Summer Series in Texas](#)

June–August 2013 (Texas)

The Federal Reserve Bank of Dallas offers this summer teacher training series.

8th Annual Underbanked Financial Services Forum

June 5–7, 2013 (Miami, Fla.)

The Center for Financial Services Innovation and *American Banker* host this eighth annual 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 improving people’s lives. The forum highlights groundbreaking innovations and showcase efforts by leading financial services providers to help underserved consumers move toward financial prosperity.

Tennessee Jump\$tart Personal Financial Education Teacher Conference

June 12–14, 2013 (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.

Keys to Financial Success Training

June 24–June 28, 2013 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia presents this five-day course for high school teachers. Program participants learn to use the “Keys to Financial Success” course plan along with “Financial Fitness for Life” and “Learning, Earning, and Investing” to teach high school personal finance.

Teacher Summer Institutes in Wisconsin

June 24–28, July 15–19, and July 29–31, 2013 (Madison, Wis.)

The National Institute of Financial and Economic Literacy offers its 13th Annual Summer Institutes series.

Vermont Teachers Financial Literacy Summer Institute

June 24–28, 2013 (Burlington, Vt.)

The Champlain College Center for Financial Literacy offers this three-day, graduate-level professional development course to prepare Vermont teachers to teach personal finance.

Teachers’ Workshops and Graduate Programs

June 24–August 2, 2013 (New York, N.Y., and Washington, D.C.)

NYSE Euronext and the U.S. Securities and Exchange Commission (SEC) are working together to help educators teach students about the financial marketplace and its importance in their lives and the global economy. The programs include three five-day Teachers’ Workshops at the New York Stock Exchange (NYSE) and two graduate programs—one at the SEC in Washington, D.C., and the other at the NYSE. There are fellowships available for the NYSE programs.

Making Sense of Money and Banking

July 15–July 19, 2013 (Philadelphia, Pa.)

The Federal Reserve Bank of Philadelphia presents this five-day course for elementary, middle, and high school teachers. The course covers money, banking, and the Federal Reserve System and includes grade-level-specific breakout sessions.

Council for Economic Education’s National Conference

October 3–5, 2013 (Baltimore, Md.)

The Council for Economic Education’s 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 students from kindergarten through grade 12.

Get Smart About Credit Day

October 17, 2013 (National)

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

Financial Literacy Conference in D.C.

October 21–22, 2013 (Washington, D.C.)

The Society for Financial Education and Professional Development, Inc. hosts this Sixth Annual Financial Literacy Leadership Conference, “Financial Literacy—Opportunities and Resources.” Attendees gain important information and strategies for enhancing the financial literacy of Americans.

National Educator Conference in D.C.

November 1–3, 2013 (Washington, D.C.)

The Jump\$tart Coalition’s fifth annual conference offers tools, resources, and support for educators of preschool through high school-aged students who are interested in teaching personal finance.

INITIATIVES

[National Retirement Planning Campaign](#)

The National Retirement Planning Coalition and the Insured Retirement Institute are sponsoring this six-month initiative focusing on important retirement planning components and concepts. Topics include understanding Social Security, the basics of investing, fraud prevention and diminished capacity, longevity, health care in retirement, and managing your assets in retirement.

[Text Messages From America Saves](#)

America Saves launches this initiative to motivate savings. People who pledge to save receive goal-specific texts to help them save and reach their goals. The texts offer tips, advice, and reminders to keep participants on track.

RESOURCES

[American Sign Language Video on Social Security](#)

The U.S. Social Security Administration offers “Social Security, SSI, and Medicare: What You Absolutely Need to Know About These Vital Programs,” available in American Sign Language (ASL). The site also offers information on requesting a reasonable accommodation.

[CFTC Consumer Resources](#)

The U.S. Commodity Futures Trading Commission (CFTC) has created new materials to help consumers identify and avoid financial fraud.

[Consumer Education and Training Services](#)

Consumer Education and Training Services (CENTS) is a 501(c)(3) nonprofit organization dedicated to teaching people how to make smart financial decisions. CENTS offers a number of free financial education programs, including “Money Sense,” a two-hour money management course; “Financial Evaluator,” an online program to help people evaluate their financial standing; and “Smart Borrowing,” a 40-minute educational video and workbook about making wise borrowing choices.

[Debt Slapped](#)

Debt Slapped combines an innovative 40-minute educational video and a Web site created by CENTS to teach students about the perils of excessive debt and the urgent need to make informed student loan and credit choices. Other educational resources are also available on the Web site.

[Economic Lowdown Podcasts](#)

The Federal Reserve Bank of St. Louis offers this podcast series for high school students. The videos discuss economics, banking, and monetary policy and how they affect the everyday choices students make.

[Investor.gov](#)

The U.S. Securities and Exchange Commission offers this Web site to help people invest wisely and avoid fraud.

[Keys to Financial Success](#)

The Federal Reserve Bank of Philadelphia and the Delaware Council for Economic Education offers this free course plan for teaching high school personal finance courses using “Financial Fitness for Life”; “Learning, Earning, and Investing”; and “Practical Money Skills.”

[Plan, Save, Succeed!](#)

The Actuarial Foundation offers the seventh installment of its Expect the Unexpected With Math curriculum. Students follow 14-year-old twins Jason and Amy as they use key financial literacy topics, such as budgeting, income, saving, and credit, to purchase a used car when they turn 16. In a companion online challenge, students practice what they have learned by answering questions on financial concepts while racing the clock.

[Pocket Cents](#)

The National Credit Union Administration offers this financial literacy Web site offering personal finance information for youth, teens, adults, seniors, students, educators, and service members in clear, easy-to-understand language and visuals.

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, 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— has been established 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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