



Adult Financial Education



TOOLS & RULES

Every individual is unique, and so are their finances! When we provide the tools, know how, and knowledge through financial education, we are empowering our members to take charge of their future!



IN A SERIES OR SEPERATELY

While the flow of the modules is designed to layer information in a financial empowerment series, presentations can be hosted on their own to address the needs of individual groups. Each presentations includes an interactive element to increase engagement, knowledge to address any personal finance hurdles that may arise, and the references needed when a challenge may be beyond the scope of an individual's know-how.



SCAN THE QR CODE TO GET TO OUR REQUEST FORM

1

PSYCHOLOGY OF SAVING & SPENDING

How psychological and environmental factors push our spending habits, which in turn affect our savings goals.

2

WHERE ARE WE GOING?

Everyone knows savings is important, but why do most Americans fall short on this important financial milestone? Learning the types, terms, and how to set a SMART goal will put you on the right path.

6

HOW DID WE GET HERE?

When divorce, disability, or death happens, an individuals finances can take a drastic turn in a negative direction. Learn the collection process along with some proactive steps to minimize loss.

3

ARE WE THERE YET?

Budgeting is a major part of everyday life, and can lead to some poor money management skills if done without proper preparation. Learn the rules to balancing a budget, and some tools to paying off debt sooner.

7

PROTECT & PROSPER

Learn the types of insurance and the benefits of each to protect your assets. Knowledge is power and empowering individuals with investment knowledge is a win win for everyone.

4

UNDERSTANDING CREDIT REPORTS & SCORES

A credit report is used for more than just borrowing. Learn how to check your report, dispute problems, and some best practices to boost your score.

8

RETIREMENT FAIR

Retirement maybe 30 years away or just around the corner. Learn some of the basics and common pitfalls in this fun interactive Retirement Fair. Classroom version is also available.

5

BETTER BORROWING

How does borrowing affect my net worth and what is this paperwork I am signing? Knowing loan basics can empower individuals and improve their relationship with financial institutions.

9

REALITY FAIR

Start with a salary and see how well you can manage your finances when you visit our 12 booths of monthly expenses. This interactive budgeting simulation is also available in a classroom setting.



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REQUEST FORM**

FUNDAMENTALS OF FINANCE



We work with the youth in our community to layer and prioritize what we focus on for each age range to give practice and reinforcement of financial wellness basics and the credit union philosophy of Save-Spend-Share.



Youth Financial Education

**K
-
2ND**

MONEY! MONEY! - READ ALL ABOUT IT

Let's pick up a book and do some classroom style reading sessions to talk about what money is and what it means to save it, how to spend it wisely, and ways we can share with or without money.

**3RD
-
4TH**

SAVE-SPEND-SHARE

We'll cover the basics of our SAVE-SPEND-SHARE philosophy by playing "Savings Coin-hole", making a Needs Vs. Wants collage, and creating card or craft for a local community group.

**5TH
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6TH**

FINANCIAL EDUCATION TRIVIA

In a fun game show style, let's test our knowledge on Save-Spend-Share fundamentals and learn along the way. There may be some questions about Credit Unions Vs. Banks and earning money, too!

**7TH
-
8TH**

SAVINGS VS. CHECKING

Let's discuss the difference between two essential accounts and their purposes. We'll also learn the anatomy of a check, how to be aware of fraudulent checks, and practice with a check-writing-relay!

**9TH
-
10TH**

GAME OF LIFE BUDGETING SIMULATION

Get a random career and living scenario, and let's walk through some budgeting decisions to see how we fare in this interactive simulation. We'll briefly touch on topics like Saving, Housing, Childcare, and Credit. -(Classroom Version)

**11TH
-
12TH**

CREDIT 101

Let's learn the basics of credit before we start borrowing. We'll cover high-level information on credit scores, credit reports, why credit is important, and how we can start building it.

College/Career Fairs

Invite us to come and play a financial education activity at a college/career fair booth

Mock Interviews

We are happy to assist with interview practice so students feel empowered to apply for any job

Reality Fairs

Ask us about our large-scale version of our Game of Life Budgeting Simulation - for groups of 100+