Financial Education Initiative

A United Way Initiative, in partnership with Bank of America
Steps in the Financial Stability Framework

- **Step 1: Increase Income**
  - EITC
  - Credit Repair/Debt Reduction
  - Workforce Development
  - Accessing Public & Employer Benefits
  - Savings Campaigns
  - Split Refunds

- **Step 2: Build Savings**
  - IDAs
  - Asset Protection

- **Step 3: Gain and Sustain Assets**
  - Asset Protection

**Results:**
- Home Ownership
- Senior and Retirement Planning
- Personal Savings Account
- Small Business Development
- Crisis Management
- Quality Childcare
- Reliable Transportation
- Continued Education

**Increased Financial Literacy/Education**
Access and Use of Mainstream Banking Products and Services
Financial Education Initiative

An initiative of United Way of Massachusetts Bay and Merrimack Valley

In partnership with Bank of America

To increase the financial stability of families via quality financial education
Financial Education Survey Report

Select Findings

- Share best practices
- Measure outcomes
- Train instructors
Affinity Group

• Allston Brighton Community Development Corporation
• Asian American Civic Association
• Dorchester Bay Economic Development Corporation
• Nuestra Comunidad
• One Family, Inc.
• Organization for a New Equality
• Urban Edge
• YWCA Malden
Financial Education Community Toolkit

about   core competencies   curricula matrix   evaluative instruments   key resources

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Where?

www.financialedtoolkit.org
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Step 1: Financial Education Survey
Step 2: Community Toolkit via Affinity Group
Step 3: Instructor Training

To increase the financial stability for families via quality financial education
Do you have a volunteer opportunity to list?
Visit www.volunteersolutions.org/boston/agency

Do you want to volunteer?
Visit www.volunteersolutions.org/boston/volunteer
Financial Education Community Toolkit

This web-based Financial Education Toolkit is designed to meet the need for quality and consistency in financial education in order to increase the financial stability of Massachusetts' low-income families.

Visit financialEdtoolkit.org today to explore curricula, core competencies, measurement tools, and other useful information that support quality financial education opportunities.

Find the tools that fit your needs today!

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