

Financial Literacy Month Toolkit | K12 Courses

Press Kit

Turnkey language and content that your team can use to build a Press Release, Pitch Letter, Media Advisory, and other external facing content.

About Your Initiative

April is Financial Literacy month, making it the perfect time to reflect on the landscape of financial wellness in America, and how **[INSTITUTION NAME]** is moving the needle.

[INSTITUTION NAME] partners with education technology company, EVERFI Inc, to provide online, interactive financial education courses to students across our footprint through **[INITIATIVE OR PROGRAM NAME]**. The initiative has reached:

- **# of schools** across our footprint
- **# of counties** across our footprint
- **# of states** across our footprint

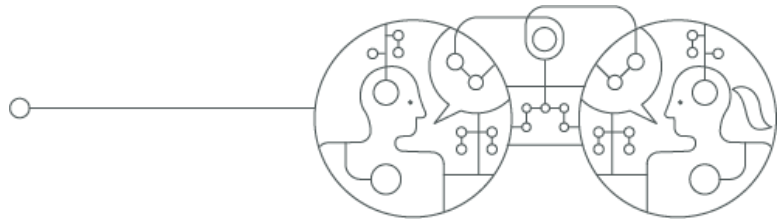
In addition, students have shown early signs of exhibiting behavioral changes that prepare them for a more secure financial future.

About Your Mission

[INSTITUTION NAME] strives to improve the financial well-being of the communities that we serve and **[INITIATIVE OR PROGRAM NAME]** is a key piece of that commitment.

Quote from Executive Stakeholder: *Is there an executive spokesperson for the program who can add a personal angle to this topic? Adding a human interest angle can help add color and interest to this topic. Quotes may include:*

- Emphasis on your institution's commitment to the community.



- Importance of reaching students with personal finance knowledge at critical ages in their development.
- The impact and scale of web-based, interactive learning.
- Commitment to building financial capability and skills at a young age.

About The Event (optional)

If you are organizing an event at a school to celebrate Financial Literacy Month, consider including the below details.

[INSTITUTION NAME] representatives will be going into **[SCHOOL NAME]** to meet the students participating in **[INITIATIVE OR PROGRAM NAME]** and lead an interactive financial education activity that reinforces the lessons learned in the course. Representatives will also lead discussion around financial skill development and answer students' money management questions.

Include the following information if possible:

- # of participating employees
- # of participating students
- % of students on free and reduced lunch
- How the school/teacher/department is implementing the curriculum

About The Technology

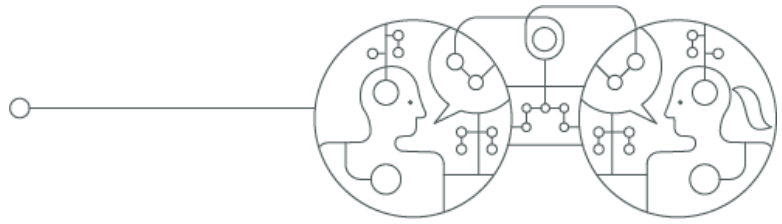
[INITIATIVE OR PROGRAM NAME] reaches students with a web-based, interactive course designed to empower young people with the essential skills needed to make sound financial decisions. This classroom-based resource allows students to move through critical topics at their own pace. The program also includes pre and post assessments and educator resources that allow teachers to track student progress and quantifiable measures of students' knowledge gain.

The technology, provided by EVERFI, is a CFPB recommended resource and is accessible to schools and students at no cost, thanks to **[INSTITUTION NAME]**'s investment.

About The Courses

Vault - Understanding Money (Elementary School)

- **[INITIATIVE OR PROGRAM NAME]** features an interactive, new-media learning platform specifically designed to introduce financial literacy skills early in a child's



cognitive development. By leveraging performance-based games, the course immerses students in real-life financial scenarios that focus on skill building and responsible decision making. Covering everything from goal setting to making a budget, **[INITIATIVE OR PROGRAM NAME]** delivers critical financial concepts in an engaging and fun way. The 2.5+ hour web-based curriculum aligns with state and national financial education standards. Topics include responsible money choices, credit and debt, and budgeting.

Venture - Entrepreneurial Expedition (Middle and High School)

- **[INITIATIVE OR PROGRAM NAME]** focuses on building and empowering the next generation of business owners and entrepreneurs by guiding them through the creation of a business plan. The web-based course allows students to move through 30-45 minute modules at their own pace. The platform uses case studies, interactive business simulations, and personal development activities to teach students how to think entrepreneurially in business and in life. Each course module provides bite-sized instructional animations that make the topics approachable and relatable. Topics include balancing a budget, managing a team, and creating a business pitch.

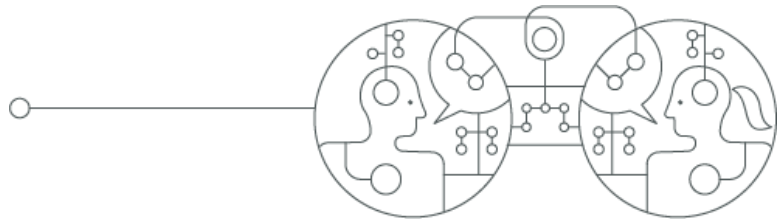
EVERFI - Financial Literacy (High School)

- Through the web-based course, students are immersed in real-life financial scenarios and documentation. Each of the course modules allows students to move at their own pace, providing bite-sized instructional animations that make the topics approachable and relatable. Complicated processes – like buying a car or filling out the FAFSA form – are broken down for the student in an easy-to-understand way. Additional topics include understanding a pay stub, savings and investing, and banking basics.

Financial Education Statistics

Include third party research to lend credibility to your media outreach and external content.

- 50% of Americans lack a rainy day fund to cover unexpected expenses for three months, in case of emergencies such as sickness, job loss, or economic downturn. [Source](#).
- Only 43% of parents describe themselves as “well prepared” to discuss money with their children. [Source](#).



- 95% of parents agree that students should learn about personal finance in school. [Source.](#)
- 61% of college students have student loans, of those 74% have \$10k-\$40k+ in student loans. [Source.](#)
- The average college student graduates owing more than \$30,000 in student loans. [Source.](#)
- Only two in five families, or 39%, had a plan for how to afford all two or four years of college. [Source.](#)
- 44% report that Social Security is or will be their household's biggest source of retirement income. [Source.](#)
- How does your state rank in financial education preparedness? Some states require financial education in highschool, but many do not. See what grade your state gets to add regional interest to your release. [Source.](#)

Program Impact

The below statistics are based on national data from EVERFI's Financial Education courses. Please consult your impact report from the 2016-2017 school year to determine the impact of your specific program. If you have any questions, please contact your Customer Success representative.

- **Knowledge Gains.** Ex: Students who completed **[INITIATIVE OR PROGRAM NAME]** increased their scores on financial literacy assessments from **[a D average to a B+.]**
- **Cumulative Reach:** Ex. The program has already helped **[more than 100 schools]** in the regional to provide quality, easy to implement financial education.
- **Attitudinal Changes:** Ex. After taking the course, **[nearly 70% of students]** reported to checking their credit scores and understanding what they meant.

Quotes

You are welcome to include the following quotes from EVERFI executives in your press release.

"Each year, Financial Literacy Month provides a valuable platform to discuss the importance of financial education, but we have an obligation to ensure these principles resonate beyond the month of April," - **Ray Martinez, Co-Founder of EVERFI and President of Financial Education.**

"For the past ten years, in schools across the country, EVERFI has worked with teachers and students to bring these lessons to life harnessing the power of technology. Whether it's



saving for the future or financing a student loan, we are committed to working with **[INSTITUTION NAME]** to prioritize financial wellness.” - **Ray Martinez, Co-Founder of EVERFI and President of Financial Education.**

“It’s imperative that today’s students are better prepared for their financial futures, and we’re grateful to our many private-sector partners that have stepped up to be part of the solution.” - **Tom Davidson, Co-Founder and CEO**

About EVERFI

EVERFI is the leading education technology company that provides learners of all ages education for the real world through innovative and scalable digital learning. EVERFI powers community focused financial education for 750 financial institutions across the country. Founded in 2008, EVERFI is fueled by its Software-as-a-Service (SaaS) subscription model and has certified over 19 million learners in critical skill areas. Some of America's leading CEOs and venture capital firms are EVERFI investors including Amazon founder and CEO Jeff Bezos, Google Chairman Eric Schmidt, Twitter founder Evan Williams, TPG Growth, The Rise Fund, Advance Publications, and Rethink Education, and Rethink Impact. The EVERFI Education Network powers more than 4,300 partners in their education initiatives across all 50 states and Canada. Learn more at everfi.com.