



FINANCIAL EDUCATION STORY

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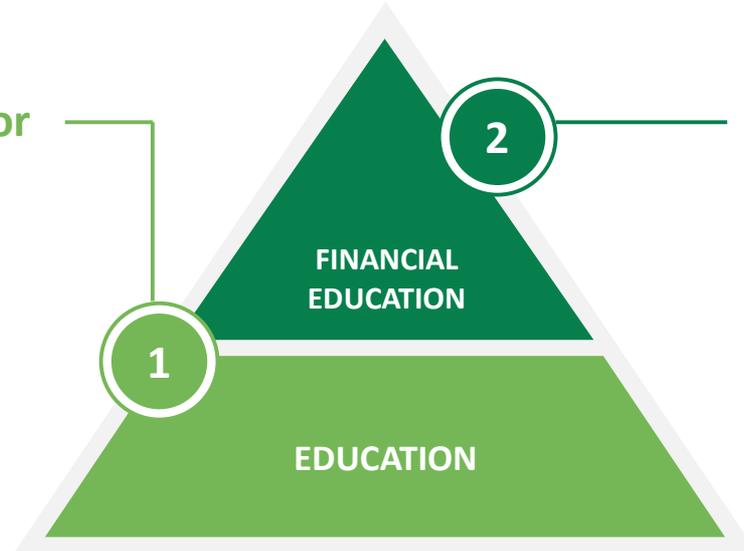
Fidelity Cares and Financial Literacy

2-PART FOCUS

Help ensure everybody – **especially those in-need** – has the **foundation to achieve financial success**

Foundational education for children

Helps create success economically and in life, and provides a foundation for acquiring financial skills and knowledge



Financial education

Key to achieving financial success

Fidelity Cares and Financial Literacy

WHAT WE DO.

Fidelity supports K-12 financial literacy in our communities through **our people, our technology** and **our expertise** by:

- **Working** with Students
- **Supporting** Teachers
- **Sharing** Our Expertise
- **Leveraging** Technology
- **Concentrating** on Impact

WHY WE DO IT.



OF YOUNG ADULTS KNOW
**BASIC FINANCIAL
CONCEPTS**



Connects with **who we are as a firm** and the **skills of our associates**.



Fidelity has a **long-standing commitment to financial education** for our customers, and this extends to Fidelity Cares.

HOW WE DO IT.

We **collaborate** with both internal and external partners. **Leverage our people and their expertise.**



Fidelity Cares Financial Literacy

PROGRAM ACTIVITIES

PERSONAL
FINANCE
CHALLENGE
SPONSORSHIP



In-Person
Teacher
Training

Advocacy

RESEARCH
SUPPORT



FINANCIAL
LITERACY
CURRICULUM
PORTAL

ONLINE
VIDEO
GAME

CAPACITY-
BUILDING
GRANTS TO
NON PROFITS



Teacher Prof.
Development
Scholarships

Nonprofit
Partners /
Program
Grant

Regional
Programming /
Volunteerism

Teacher
Resource Portal

Virtual
Volunteering
(Essay
judging)

Classroom Visits
& Hosting
Students

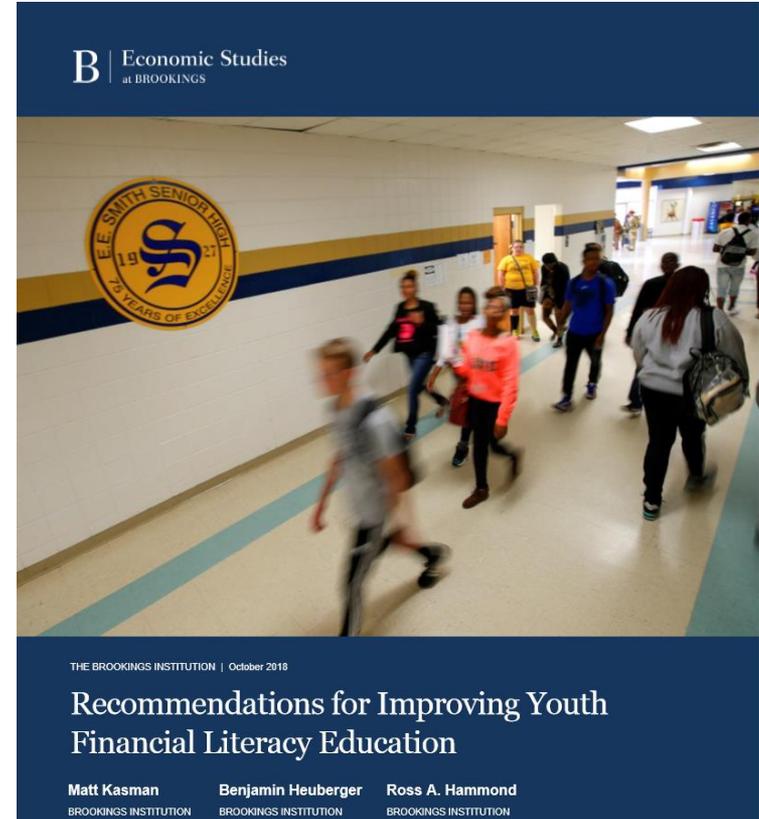


Fidelity Cares Financial Literacy

RESEARCH SUPPORT

KEY RECOMMENDATIONS

- Start financial education efforts earlier and reach elementary and middle school students
- Include participatory learning
- Involve parents
- Train teachers
- Consider key demographics including race/socio-economic status and gender
- Improve program evaluation



Fidelity Cares Financial Literacy

RECENT INITIATIVES



FINLIT LIBRARY: VOLUNTEER PORTAL

Create a **web resource accessible to all employees** which provides age-appropriate, Compliance-approved **financial literacy lessons and activities** from CEE and JA curriculum.



SIFMA FOUNDATION INVESTWRITE

Provide enterprise-level support and promotion for **virtual volunteer opportunities to judge financial literacy essays twice a year.**



TEACHER FINANCIAL LITERACY TRAINING

Hosting teachers from across the state for all-day trainings based on the Jump\$tart Financial Foundation for Educators model to **improve teacher knowledge and confidence.**