FINANCIAL EDUCATION STORY

Rick Metters & Ashlee Accetta
Fidelity Cares and Financial Literacy

2-PART FOCUS

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

1. Foundational education for children
   Helps create success economically and in life, and provides a foundation for acquiring financial skills and knowledge

2. 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.

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.

ONLY 27% OF YOUNG ADULTS KNOW BASIC FINANCIAL CONCEPTS
Fidelity Cares Financial Literacy

PROGRAM ACTIVITIES

PERSONAL FINANCE CHALLENGE SPONSORSHIP

ONLINE VIDEO GAME

CAPACITY-BUILDING GRANTS TO NON PROFITS

In-Person Teacher Training

Advocacy

RESEARCH SUPPORT

FINANCIAL LITERACY CURRICULUM PORTAL

Teacher Prof. Development Scholarships

Nonprofit Partners / Program Grant

Regional Programming / Volunteerism

Teacher Resource Portal

Virtual Volunteering (Essay judging)

Classroom Visits & Hosting Students

Teacher Resource Portal

Regional Programming / Volunteerism

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RESEARCH SUPPORT

- 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.