



## News and Information about Working Together with *Money Smart*

### In This Issue

- [Message from the FDIC](#)
- [Updated Money Smart for Adults Scheduled for Release in September](#)
- [Join the FDIC's Money Smart Advance Team](#)
- [Money Smart for Small Business Town Hall](#)
- [Webpage Lists New Members of the Money Smart Alliance](#)
- [FDIC Consumer News Features Tips on Protecting Assets](#)
- [Success Stories from Money Smart Alliance Members](#)

### Message from the FDIC

Our years of experience with the FDIC's *Money Smart* financial education program (unveiled in 2001) have taught us that our Alliance members are central to its success. These organizations have stepped forward to join the FDIC-recognized network of key users of the curriculum. That's why this edition of *Money Smart* News begins by shining the spotlight on the work of our Alliance members, including our newest additions to the Alliance.



If you are not yet an Alliance member, now may be a good time to join. Membership is free. It's quick and easy to [sign up](#), and you may benefit from new ideas and opportunities that are shared by your peers and the FDIC. In fact, we plan to allow our Alliance members to be the first to see and receive training on our updated *Money Smart* for Adults curriculum by early fall. We are grateful to Alliance members who have given us ideas and feedback that will help make the revised curriculum stronger.

We also hope the updated adult curriculum can support a broad array of economic inclusion initiatives. For example, the FDIC is expanding awareness of accounts under the Achieving a Better Life Experience Act of 2014 (the ABLA Act). These ABLA accounts allow individuals with disabilities to accumulate savings by putting money in savings accounts and investments that can grow tax-free. The updated curriculum, with new information on ABLA accounts and many other topics, will be a wonderful tool that organizations serving persons with disabilities can use to build relationships with financial institutions.

Also, remember that we are eager to hear from you about promising approaches or successful strategies involving *Money Smart* that we can share with other financial educators in a future edition of our newsletter. Whether you are offering suggestions or looking for assistance, e-mail us at [moneysmartnews@fdic.gov](mailto:moneysmartnews@fdic.gov).

*Elizabeth Ortiz*

**Deputy Director, Consumer and Community Affairs  
FDIC Division of Depositor and Consumer Protection**

### Updated Money Smart for Adults Scheduled for Release in September

The FDIC expects to issue an updated version of Money Smart for Adults in September 2018. It will feature design improvements along with new content, activities, and modules that are influenced by instructional best



# Money Smart News – Spring/Summer 2018

Federal Deposit Insurance Corporation

[communityaffairs@fdic.gov](mailto:communityaffairs@fdic.gov)

practices. Alliance members shared insights that contributed to the updates. To learn more about Money Smart or other financial education resources from the FDIC, visit [www.fdic.gov/education](http://www.fdic.gov/education).

## Join the FDIC's Money Smart Advance Team

Would you like an early review of the updated Money Smart for Adults materials along with training to orient your staff to the new materials? Sign up for the Money Smart Advance Team (MSAT), which will operate through 2019 as a subset of the Money Smart Alliance. Joining also makes you eligible to be considered for recognition in a special Money Smart News edition that will highlight several noteworthy examples of curriculum implementation.

## Money Smart for Small Business Town Hall

On March 29, 2018, the FDIC and the Small Business Administration (SBA) hosted a [Town Hall](#) webinar to showcase organizations that use Money Smart for Small Business (MSSB), provide curriculum updates, and discuss opportunities to support product development. After attending Town Hall meetings, participants learn how to customize the MSSB modules to meet the diverse needs of small business owners. To learn about more benefits or to check out past and future Town Hall events, go to our [Town Hall](#) webpage.

## Webpage Lists New Members of the Money Smart Alliance

The FDIC welcomed 60 new members to the Money Smart Alliance during the first quarter of 2018. To see who they are, go to the newly created [Money Smart Alliance – New Members](#) webpage. Among the benefits of membership is the opportunity to be listed on the FDIC website, which can facilitate collaborations among organizations to use Money Smart and help consumers find training. To learn more or to submit your request for membership, go to our [Money Smart Alliance](#) page.

## FDIC Consumer News Features Tips on Protecting Assets

The Winter 2018 issue of FDIC Consumer News includes information about using safe deposit boxes and home safes to protect valuables, guarding against criminals who place hidden recording devices at or near automated teller machines (ATMs) and retailer checkout registers, and new standards for credit reporting that may help consumers improve credit scores and qualify for loans under more favorable terms. This edition of the newsletter also provides information about the increasing use of mobile phones for banking and paying, and an article on how mortgage appraisals can help borrowers as well as lenders. [See this issue](#) and get subscription information for this free newsletter.

## Success Stories from Money Smart Alliance Members

We recently reached out to some of our [Alliance members](#) to hear about their experiences teaching Money Smart and have included these in our [Success Stories](#) feature. We hope these insights inspire you to consider new ways to use Money Smart to help build financial capability for people in your community.

Find current and previous issues of Money Smart News [here](#).