

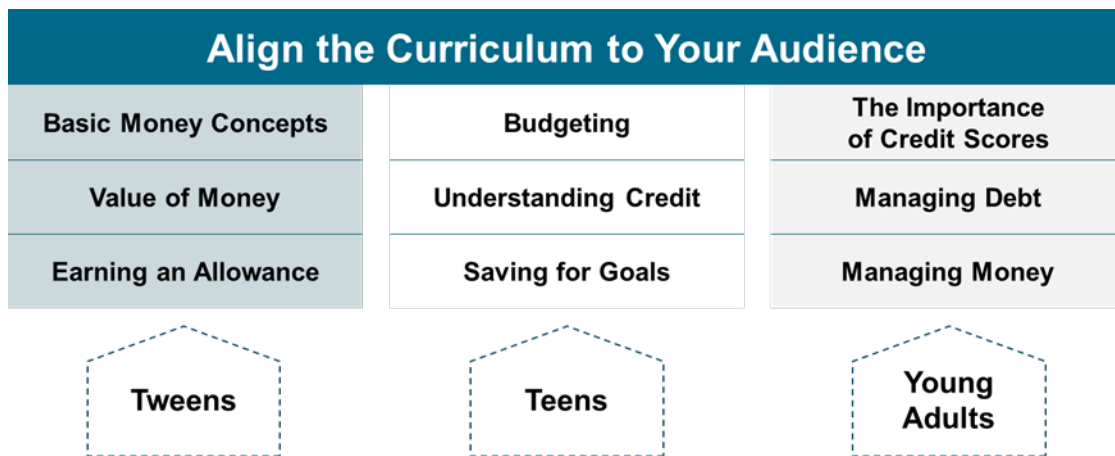
# Driving Growth Through Multigenerational Relationships



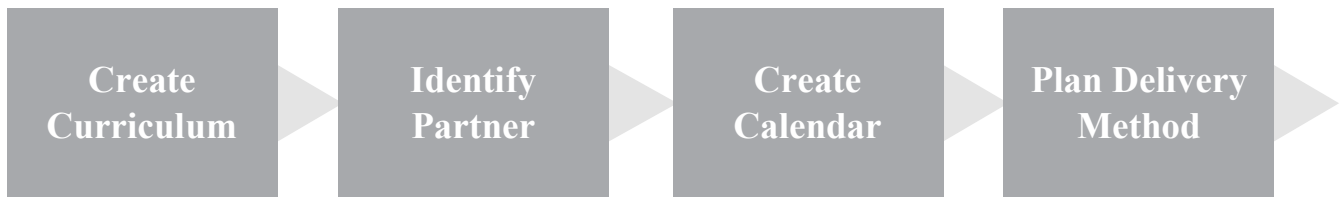
## Take Action: Build and Deliver a Tailored Financial Literacy Program

When you enhance financial literacy among your clients and their children, you make a profound impact on their wellbeing while also differentiating your business. Use this tool to organize a tailored and engaging educational program for families.

Consider the audience you wish to reach and their needs.



### Four Steps to Building Your Financial Literacy Program



### Financial Literacy Resources

- National Financial Educators Council ([financialeducatorsCouncil.org](http://financialeducatorsCouncil.org))
- Financial Services Institute ([financialservices.org](http://financialservices.org))
- SIFMA ([sifma.org](http://sifma.org))
- Mutual fund companies

*continued*

FINANCIAL LITERACY PROGRAM OUTLINE

<b>Program Manager</b>		
<b>Program Instructor(s)</b>		
<b>Other Participants' Roles and Responsibilities</b>		
<b>Name</b>	<b>Role</b>	<b>Responsibilities</b>
<b>Intended Audience</b>		
<b>Topics</b>		
<b>Month</b>	<b>Topic</b>	
<b>Methods of Delivery</b>	<b>In Person Locations</b>	<b>Virtual</b>

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