



## Case Studies & Activation Ideas

These are just examples of our prior work. Activations are customized to meet your specific needs and reach your desired audience.

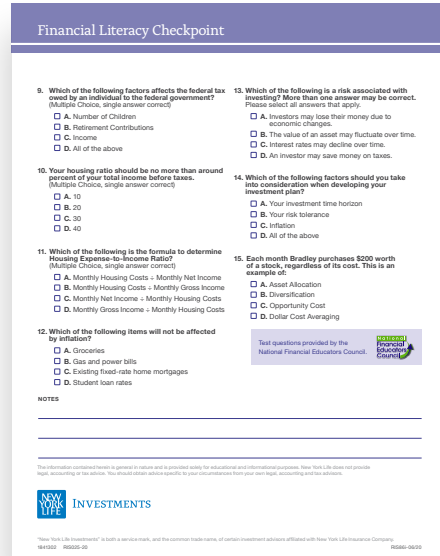
# Financial Literacy Test Activation: Case Study

## Financial Literacy Tests

With over 151,000 test takers, one of the largest testing banks in the industry, and top organic positioning on Google searches – the NFEC’s tests provide custom opportunities to connect with your target audience.

### Case Study Custom Tests & Quizzes: New York Life

New York Life partnered with the National Financial Educators Council to distribute tests to their advisors as part of their Women & Investing program and promoted internally. The agents in turn shared this with their client’s to better understand their client’s needs and current level of financial knowledge.



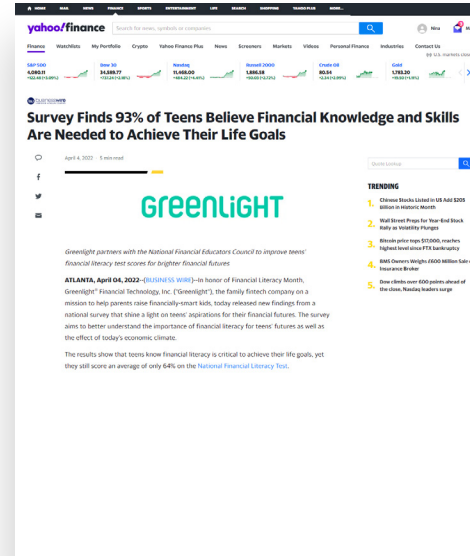
### Market Targeted

-  Female
-  Socio-economic: High Net Worth
-  Age: 45 - 74
-  Existing Clients








### Case Study Custom Tests & Quizzes: Greenlight

Greenlight partnered with the NFEC and leveraged their national financial literacy test to better understand the knowledge of youth that used their education app. A customized education training map was built to address the 7 core areas covered in the test. Over 1,200 youth participated in the test and promotions received positive media coverage in national and trade publications.



### Market Targeted

-  Mixed
-  Socio-economic: Building Financial Foundation
-  Age: 15 - 24
-  Existing Clients

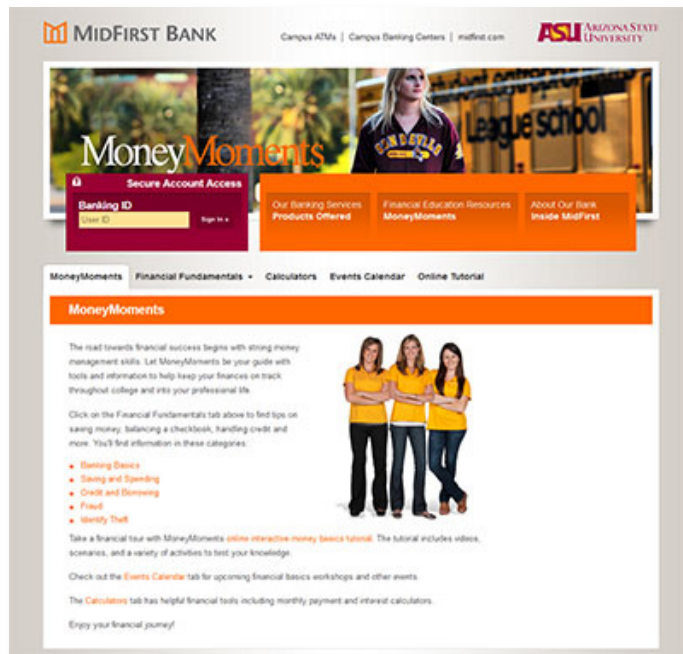


# Financial Educator Development Activation: Case Study

Connect with those who will be teaching personal finance through our financial education instructor training. Recognized as the leading training for financial educators and the only one offered by an Accredited provider, we have trained more than 6,000 clients and over 90,000 have taken our micro-courses. Examples of customized opportunities:

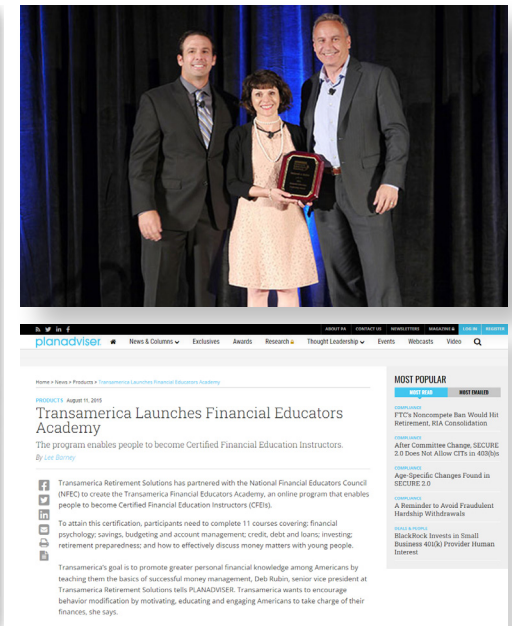
## MidFirst Bank / Arizona State University

The NFEC developed a custom peer-to-peer financial education training for MidFirst Bank to deploy across Arizona State University. ASU students were trained and certified to deliver the NFEC-created customized workshops for students across campus.



## Transamerica / Aegon

Transamerica enlisted the NFEC's support to develop the Transamerica Financial Educators Academy. Custom Certified Financial Education Instructor training was provided to over 500 financial advisors who used materials and promotions created by the NFEC for their in-house and independent advisors. Launched live events, press campaigns, internal marketing, and awards presented to their executive team.



# Financial Education Awards Activation: Case Study

Our industry recognition awards launched in 2014 and have recognized 750 individuals from 47 states for their service on Financial Educators Day (last Friday in April). From among this group, one person annually is selected as a leader in the financial education space and presented with the Financial Education Instructor of the Year Award.



## DreamCatcher Wealth Management

DreamCatcher founder Stan Webb wanted to enhance his leadership in the financial education space across Kansas. He partnered with the NFEC to recognize 18 educators to receive the Financial Educators Day award. This recognition was integrated with his financial education programming and covered by the Wichita

Eagle News and the Wichita City Council. The awards opened up opportunities to deliver presentations to multiple organizations, schools, and agencies.



## Financial Education Instructor of the Year



Bola Sokunbi is a Certified Financial Education Instructor (CFEI), 4x bestselling author, founder of Clever Girl Finance, and recipient of the 2021 Financial Education Instructor of the Year (FEIY) Award.

## Celebrity Collaboration Activation Case Study

Since its inception, the NFEC has created unique activations with over 50 celebrity supporters who participated in live events and produced multimedia content that promotes financial wellness.

### Jeanne D'Arc Credit Union & Lowell High School

This NFEC celebrity speaker event reached more than a thousand high school students. The event received positive media coverage, with several million impressions coming from a 4.5-minute feature on the Yahoo Sports 'Outside the Game' production.



### US Bank Grand Junction & Coalition of Other Sponsors

The NFEC-led financial event generated several million impressions via television, radio, and print. Top stars shared their personal finance stories and live bands and dance crews provided entertainment to keep the energy high. Additional sponsors included Wells Fargo, State Farm, Channel 11 News, Cumulus Broadcasting, Channel 8 News, and the City of Grand Junction.





## Let's Start or Continue the Conversation

We look forward to hearing about your organization and community objectives. For groups aligned with our sponsor/partner criteria, we will design a custom campaign and establish quantifiable outcome criteria so you can measure our success.