

Financial Education Solutions



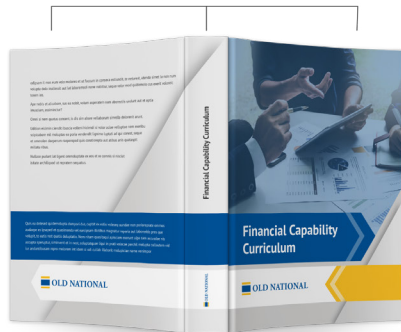
Custom Branding: Student Guides & Presentations

The NFEC offers you a variety of custom branding options to ensure that your organization's messaging is communicated in alignment with your objectives. This customization helps promote your organization and features your efforts to bring high-quality educational resources to your community.

The NFEC offers comprehensive custom branding options that perfectly match your brand. The NFEC logo is removed and replaced with your logo, color scheme, custom copy, and other options.

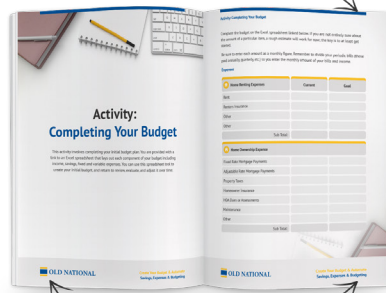
Advanced Custom Branding Option

Your branding applied to full external cover



Front / back covers and full external cover (including spine) delivered as separate files to accommodate your binding preference (spiral binding, perfect binding, etc)

Your Brand Colors



Your Logo Your Brand Colors

Your Brand Colors

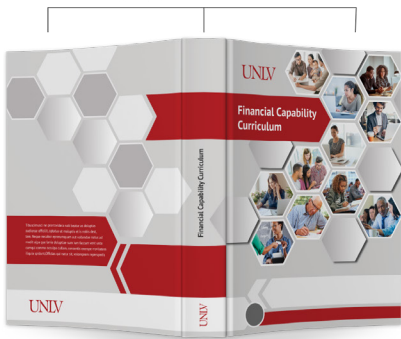


Your Logo Your Brand Colors

Includes: Custom Curriculum Title | Your Logo Throughout | Your Color Palette Throughout | Custom Full External Cover Design | Custom Internal Title Page | Your Contact Information (Optional) | Your Legal Disclaimer (Optional) | Void of NFEC Logo, Branding, & Mention | Program Recognition: Financial Literacy Standards Alignment Verified

Basic Custom Branding Option

Your branding applied to full external cover



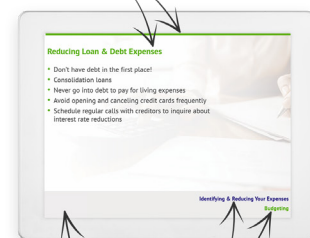
Front / back covers and full external cover (including spine) delivered as separate files to accommodate your binding preference (spiral binding, perfect binding, etc)

NFEC Brand Colors



NFEC Brand Colors
No NFEC Logo

NFEC Brand Colors



NFEC Brand Colors
No NFEC Logo

Includes: Custom Curriculum Title | Custom Full External Cover Design | Your Logo on Cover | Interior Page Color Scheme Green and Blue | Custom Internal Title Page Your Contact Information (Optional) | Your Legal Disclaimer (Optional) | Void of NFEC logo

Financial Literacy Curriculum for All Ages

The NFEC offers comprehensive financial literacy education resources that have been widely recognized for their ability to connect with students and inspire participants of all ages and socioeconomic backgrounds to take positive financial action.

The material has been tested by tens of thousands of organizations and has gone through several iterations with a development team of hundreds of experts to create state-of-the-art financial education resources that make a lasting difference in participants' financial capabilities.

Customize Lessons with Materials for All Ages

New technological innovations allow you to easily customize the coursework that is best for your audience. With the Publish on Demand Center, you simply select the specific lessons you'll be teaching and the PODC will output a PDF file. Includes: instructor guide, student guide, PowerPoint, and support resources.

Designed around Research-based Educational Methodologies & Standards

Because every person has different financial habits, emotional connections with money, and current financial realities – we as financial educators need to consider more than just content knowledge in our programs. Best-quality financial literacy curriculum also must include a focus on behaviors, establishment of systems, and sentiments; and help learners work toward positive outcomes.

- Backwards planning to ensure that lessons and activities build to support learner progress toward pre-defined outcomes;
- Active learning techniques, including visual, social, self-regulated, and project-based learning;
- Audience adaptation to enable instructors to scaffold and adjust activities to support learners of all different motivations, knowledge levels, and learning styles;
- Engagement with the affective dimension of learning and motivation in general, and of changing financial behaviors more specifically;
- Recommendations for system development and long-term follow-up and support to encourage permanent change.

Kids & Elementary (Ages 3 to 14)



High School, College, & Youth (Ages 14 to 25)



Adult & Life Stages (Ages 25+)



Custom Branding: Online Learning Center

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Advanced Custom Branding Option



Includes: Custom Online Learning Title | Your Logo on All Webpages | Your Color Palette Throughout | Custom Domain or Subdomain | Your Contact Information (Optional) | Your Legal Disclaimer (Optional) | Void of NFEC Logo, Branding, & Mention (Optional) | Program Recognition via Financial Literacy Standards Alignment Verified

Basic Custom Branding Option



Includes: Custom Online Learning Title | Your Logo on All Webpages | Customizable 'About' Page | Color Scheme Green and Blue | Your Contact Information (Optional) | Your Legal Disclaimer (Optional) | Custom Domain or Subdomain | Void of NFEC Logo

eVolve Online Learning Platform

The NFEC's eVolve online personal finance course leverages best practices in online personal finance education. Educational-grade content and vivid design create a unique learning experience where participants take action toward building a sound financial foundation.

Designed around Research-based Education Principles to Deliver Measurable Results

Providing a great user experience combined with sound education methodologies creates an authentic, dynamic learning experience designed to accommodate various learning styles. Videos, quizzes, activities, and interactive learning tools comprise the eVolve education platform.

- **Practical & Rooted in Research-based Education Principles.** eVolve balances instructional methodologies with practical learning needs that inspire participants to take action.
- **Activities Support Participants Practical Application.** The course has participants work on their finances through real-world activities.
- **Research-based Educational Strategies.** Grounded in constructivism, eVolve employs a learner-centered approach. Strategies include simulation, project-based learning, personal planning, and case studies.
- **Measurements & Need-based Assessments.** Self-assessment tools help learners understand what lessons will help them most now so they can focus their education on improving their own immediate needs.

High School, College, & Adult Coursework



The eVolve course is comprehensive and covers basic through advanced lessons. From basic budgeting and debt management to investments and financial planning – this platform offers users access to trusted, unbiased financial education.

Facilitator Backend Management – Learning Management System (LMS)

The eVolve Learning Management System gives the course facilitator the ability to monitor student progress, view test and quiz results, download reports to Excel spreadsheets, and set up student groups. Receive rich participant reports, group segmentation opportunities, group management, and communication tools.



Certified Financial Education Instructor (CFEI®)

The CFEI® coursework meets standards for the highest academic rigor while providing practical financial education knowledge. Graduates possess the skills and teaching techniques that help them motivate, engage, educate, and move participants of all ages to take positive financial action.

The CFEI® program helps individuals acquire the expertise, credibility, and self-assurance they need to teach money management lessons effectively. Graduation from the NFEC's financial literacy certification program demonstrates that you are qualified to teach the subject matter and increases your credibility as a financial education instructor.

Lessons & Learning Outcomes

Lessons will cover the topics outlined in the Framework for Teaching Personal Finance. The NFEC teamed with the Danielson Group, developers of the most widely referenced educator standards in the education industry. This collaboration yielded the first and only national standards for financial educators – the Framework for Teaching Personal Finance. The qualifications set forth in the Framework give public assurance that financial education instructors are held to the highest standards of practice.

- CFEI Welcome, Introduction, & Training Warm-up Activities
- Needs, Role, & Mission of Financial Education Instructors
- Financial Educator Skill Sets: Overview, Standards, & Reasons
- Content Knowledge (Not required if completed CFLP training)
- Planning & Preparation: Program Design
- Planning & Preparation: Measurements
- Environment: Creating a Positive Education Environment
- Instruction: Communicating Strategies for Teaching Personal Finance
- Instruction: Education Methodologies
- Instruction: Movement to Action Strategies
- Professional Development & Responsibilities: Professionalism & Growth
- Recap, Final Exam, & Certification Requirements

Course Requirements & Details

Training Schedule: Self-paced and self-directed.

Training Hours: 40 – 70 hours depending on experience and pre-existing knowledge.

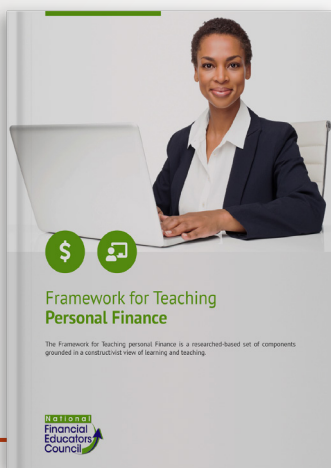
Testing: Complete test of 115 – 135 questions (varies by version) with a passing score of 75%. Online, closed-book test.

Ongoing Education: Every 3 years and must be completed within 7 months of anniversary date. 20 – 30 questions with a passing score of 75%. Training resources provided.

Prerequisite: None.

Certified Financial Education Instructor® (CFEI®)

The CFEI® program helps individuals acquire the expertise, credibility, and self-assurance they need to teach money management lessons effectively. Graduation from the NFEC's financial literacy certification program demonstrates that you are qualified to teach the subject matter and increases your credibility as a financial education instructor.



Setting Industry Standards

The NFEC, an IACET Accredited Provider, teamed with the Danielson Group, developers of the most widely-referenced educator standards in the education industry. This collaboration yielded the first and only national standards for financial educators – the Framework for Teaching Personal Finance.

The CFEI® program was designed around the Framework for Teaching Personal Finance. The qualifications outlined in the Framework give public assurance that financial education instructors are held to the highest standards of practice.

Most Recognized Financial Educator Credentials

Graduates receive leading industry credentials that position them as qualified educators. Financial educators who earn their CFEI® stand out from competitors, deliver more effective and engaging presentations, and have earned a unique value proposition among organizations that book speakers.

The CFEI logo, graduate certificate, and CEU award letter are provided to graduates to use in their promotions and meetings with organizations.



94.97%

Increase of Confidence

Do you feel more confident in your knowledge of how to deliver financial literacy topics?

95.60%

Adaptation of Curriculum

As a result of this training, my capacity to adapt the curriculum to meet the needs of my audience has improved.

98.74%

Incorporation of Content

Will you incorporate what you learned next time you teach financial literacy?

96.23%

Recommend

Would you recommend that other financial educators complete this class before teaching financial literacy?

Industry Standards for Financial Educators

The NFEC's standards for learners and educators were developed to improve the quality and enhance the impact of financial literacy instruction. These standards define what a person should know about personal finance across the core areas of this subject matter and the best practices for teaching personal finance.

These are the only standards developed by an Accredited Provider – the NFEC – who worked with a team of over a hundred professionals from financial services, traditional education, personal finance, and psychology to develop standards both for the people delivering the education and for those learning the subject matter.

Student Learning Standards & Guidelines

The student learning standards reports for elementary, high school, and adult learners set forth learning goals and educational targets for financial literacy curriculum and instruction.

Policy and Standards Framework for High School Financial Literacy Education



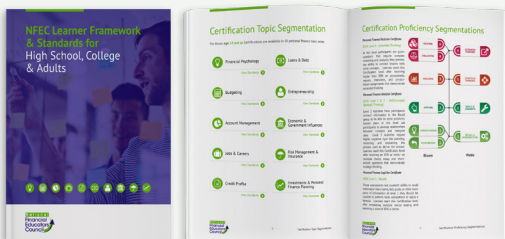
Instructors & Providers – Standards & Methodologies

These standards guide financial education instructors and outline educational methodologies that assist educators to become more effective instructors and help students improve their financial capabilities.

Framework for Teaching Personal FinanceSM



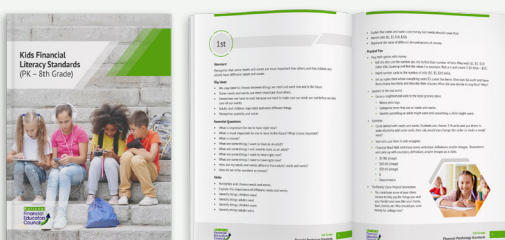
Financial Literacy Framework & Standards for LearnersSM – High School, College, & Adult



Educational Methodologies of Personal FinanceSM



Kids Financial Literacy StandardsSM – PK – 8th Grade



Financial Coaching Standards & Code of Conduct



Consultant Training & Resources for Those Who Serve Organizations

Speakers and content creators represent much of the financial education industry; however, they miss out on larger revenue opportunities that our graduates enjoy. The NFEC helps you stand out as you offer consultation services that position you as an expert and diverse services that have a positive impact on your bottom line.

Higher Revenue Opportunities via Consultant Services

While speakers and content creators just charge for a single line item, NFEC graduates can charge for five line items with larger margins, including:

Program Design & Consultation – pull together the lessons that best meet outcome objectives.

User Experience Coordination – registration process, marketing, ongoing education, handouts.

Speaker, Coach, and/or Personnel – time you or your team spend leading the program.

Measurement Impact Reports – fill-in-the-blank reports that demonstrate program impact.

Student Materials Fees – student guides, online learning, or access to your content.

Turnkey System to Serve Organizations as a Financial Education Consultant

The NFEC supports financial education programming consultants to ensure that your participants receive a meaningful learning experience and you help organizations achieve positive outcomes. Having developed thousands of financial education campaigns, we can give you access to the resources and expertise to make your program successful.



Scripts & Processes.

Access the scripts and processes to execute effective consultations.

Design Training.

Learn how to customize a financial literacy program for organizations.

Program Customization Resources.

Easily customize the program to your unique audience.

Program Templates & Checklist.

Become well-prepared for your program with these support tools.