

Financial Education Tools

Financial Education Tools

Financial Education Tools – Sorted by Audience

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PRODUCT

Kirby Kangaroo

AUDIENCE

Children ages 0-12

OFFERED BY

Credit Union Association of New Mexico (CUANM)

COST

No annual program fees if the credit union participates in the CU Succeed® program. Newsletters and trinkets must be ordered through CUANM.

MATERIALS

None

WEBSITE

www.kirbykangaroo.com

MARKETING SUPPORT

Credit unions contact CUANM directly.

ADDITIONAL INFORMATION

The program is tailored to credit unions in general. For more information, visit www.kirbykangaroo.com/info or call 866.262.8336.



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PRODUCT

Moonjar

AUDIENCE

Children ages 0-12

OFFERED BY

Moonjar, LLC. Based in Seattle, WA.

COST

Variety of products:

- Moonjar money boxes for \$7.95 and \$25
- Family kit with moneybox for \$55
- The ABCs of Money kit for \$12.95
- The Game that Questions Money for \$16
- The Game that has Everyone Talking for \$16
- The ABCs of Money animated CD for \$9.95
- How the Moonjar was Made book for \$9.95
- The Leader's Lesson Plan (English and Spanish) for \$14.95
- K-5 classroom kit with curriculum for \$140
- Bulk moonjars sold in units of 100 for \$325

Moonjars can be customized and there are customized Moonjar bands

WEBSITE

www.moonjar.com

MARKETING SUPPORT

Accel offers on-site workshops, “train the trainer” sessions, materials and co-branded materials for purchase, and develops a marketing plan.

ADDITIONAL INFORMATION

For information call 888.323.0001 or email contact@moonjar.com.



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PRODUCT

The Stock Market Game

AUDIENCE

Elementary, middle and high school students

OFFERED BY

SIFMA Foundation for Investor Education

COST

Free.

MATERIALS

Ten-week simulation of Wall Street training, set up as a competition across grades in divisions. Teams have a hypothetical \$100,000 to invest in common stock on the NASDAQ and NYSE.

Schools must be located in Iowa and a teacher must have an active and valid email address. Internet access is required with Internet Explorer versions greater than 4.0 with JavaScript and cookies enabled.

WEBSITE

www.stockmarketgame.org

ADDITIONAL INFORMATION

For information contact Chris Anderson, SMG Coordinator, Farms Intermediate School at 877.979.4999 or chris.smgmi@yahoo.com.



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PRODUCT

MoneyIsland

AUDIENCE

Middle school classrooms

OFFERED BY

Freedom Institution

MATERIALS

Online, virtual game.

WEBSITES

For information, visit demo.moneyisland.com.



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PRODUCT

Family Economics & Financial Education (FEFE)

AUDIENCE

Middle school and high school classrooms

OFFERED BY

Take Charge America (a Phoenix, AZ-based nonprofit credit counseling and debt management organization) and the Institute for Consumer Financial Education and Research at The University of Arizona

COST

Free

MATERIALS

Classroom materials, teacher training, newsletters, and grants. The curricula is free to download after creating an account

WEBSITES

For information, visit www.fefe.arizona.edu.



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PRODUCT

Modoh Island (Formerly CU Island, Credit Union Island, and Virtual Finance)

AUDIENCE

Middle school and high school classrooms

OFFERED BY

Thwakk, Inc.

COST

Interested credit unions need to complete a demo first.

MATERIALS

Entirely online - Modoh Island is a 3D virtual immersive financial education simulation game.

WEBSITE

www.modohisland.com

MARKETING SUPPORT

Branded website.

ADDITIONAL INFORMATION

Product can also be offered to teachers and used in the classroom or parents for use at home. Contact Scott Moriarty for more information at scott.moriarty@thwakk.com or 804.366.7665.



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PRODUCT

National Endowment for Financial Education (NEFE) High School Financial Planning Program

AUDIENCE

High school classrooms

OFFERED BY

NEFE in cooperation with Cooperative Extension and credit unions.

COST

The materials are offered at no cost to schools and community groups such as 4-H, church groups, etc.

MATERIALS

Each student receives a student guide. There is a comprehensive instructor's guide and resources on the website for teachers.

WEBSITE

hsfpp.nefe.org

MARKETING SUPPORT

NEFE supplies marketing packets to target teachers.

ADDITIONAL INFORMATION

The program mentions credit unions and banks in the materials. Materials are at the 8th grade reading level and are primarily used with grades 9-12.

Contact Mary Beth Kaufman, Iowa State University Extension, for more information at mbkaufma@iastate.edu or 712.755.3104.



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PRODUCT

National Financial Capability Challenge

AUDIENCE

High school classrooms

OFFERED BY

U.S. Department of Treasury

COST

Free

MATERIALS

Educator toolkit includes ready-to-use lesson plans in PDF format, followed by a “Challenge Exam” for students to complete online. The website says it takes the average student less than 30 minutes to complete.

WEBSITE

For information visit www.challenge.treas.gov/about.aspx.



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PRODUCT

EverFi

AUDIENCE

High school classrooms

OFFERED BY

EverFi, Inc. (based in Washington, DC)

COST

\$5,000 per high school, about \$2,500 per grade. Offered to schools free of charge. Local sponsors pay the cost.

MATERIALS

No hard copy materials, entirely web based.

WEBSITE

www.everfi.com

MARKETING SUPPORT

Can be customized.

ADDITIONAL INFORMATION

The program includes 10 modules, 600 topics, 3-D gaming, simulations, and participants can be certified. Contact Thomas Davidson, Jr. for more information at tom@everfi.com or 202.629.0326 x701. Adopted by the Iowa College Student Aid Commission.



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PRODUCT

Banking Is

AUDIENCE

High school classrooms

OFFERED BY

GreenPath Debt Solutions (Farmington Hills, MI)

COST

Credit union must become a sponsor and can co-brand materials.

MATERIALS

Includes 30-minute video, facilitator's guide, PowerPoint presentations, overhead transparencies, instructor's guide, student study guide, and computer software.

WEBSITE

www.learntobank.com

MARKETING SUPPORT

Co-branded materials.

ADDITIONAL INFORMATION

The program is complete in five classes. To learn more about the Banking Is program or for sponsorship information, contact 248.459.0920 or email bankingis@greenpath.com.



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PRODUCT

Banzai!

AUDIENCE

Ages 13 - college classrooms

OFFERED BY

Kendagriff, LLC, Provo, UT

COST

\$150 per teacher with \$99 for 20 packets for students.

WEBSITES

www.teachbanzai.com

www.cuinschool.com

MARKETING SUPPORT

Has a specific program for credit unions to reach schools. Lesson plans are available at www.teachbanzai.com/lesson-plans.

ADDITIONAL INFORMATION

Ascentra Credit Union in Bettendorf is a participating credit union. If a teacher in the area requests a Banzai presentation, Banzai notifies Ascentra. Sessions are scheduled for in-classroom presentation. Banzai materials can be branded with the credit union's logo. Ascentra has presented at 16 different schools using Banzai.

For more information, email support@teachbanzai.com.



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PRODUCT

BizKid\$

AUDIENCE

Middle school, high school and college classrooms

OFFERED BY

National Credit Union Foundation (NCUF) and the Washington Credit Union Foundation

COST

DVD Box set is \$168. Curriculum is free.

MATERIALS

DVD and curriculum

WEBSITES

www.waleague.com

www.bizkids.com

MARKETING SUPPORT

Able to download promotional materials and purchase promotional items.

ADDITIONAL INFORMATION

The program has been funded since 2007 and includes information on entrepreneurship.

For more information, visit: www.ncuf.coop/home/programs/bizkids/bizkids.aspx.



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PRODUCT

CU Succeed® Teens Financial Network

AUDIENCE

Middle school, high school and college classrooms

OFFERED BY

Credit Union Association of New Mexico (CUANM)

COST

No set up fee. Annual program costs range from \$240-\$600 depending on asset size. Hard copy newsletters and marketing materials are available for additional fees.

MATERIALS

Website and hard copy issues of newsletters are available.

WEBSITE

Website is hosted and content is updated by the Credit Union Association of New Mexico. Credit unions link to CU Succeed® from their website.

MARKETING SUPPORT

Customized print materials sent directly to teens, a customized online resource website, quarterly newsletter and marketing tips.

ADDITIONAL INFORMATION

For more information, visit www.cusucceed.net.



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PRODUCT

Financial Literacy Series

AUDIENCE

High school and college students

OFFERED BY

Iowa College Access Network

COST

Cost will depend on arrangements.

MATERIALS

“Money Management Guide”, “Life After College” and “Achieve Financial Success” booklets, “Credit Matters” and “Graduate Student Success” guides.

WEBSITE

www.ICANSucceed.org

MARKETING SUPPORT

Marketing/press kit available for presentations. Kit includes posters, press release templates, media releases, and more.

ADDITIONAL INFORMATION

Formerly provided by Iowa Student Loan. Contact Carla Jesse for more information at cjesse@ICANSucceed.org or 319.855.2555.



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PRODUCT

FoolProof

AUDIENCE

High school classrooms, college students, young adults, and adults

OFFERED BY

Credit Union Association of Colorado/Wyoming via Credit Union Strategic Partners

COST

Annual program cost varies by the size of credit union, the number of videos they subscribe to, etc. Costs range from \$725-\$125,000 per year. Includes an initial three-year lease, then annually afterwards.

MATERIALS

Program is entirely web-based. Pretests and tests are available for students. Brief lesson plans available for teachers.

WEBSITE

www.aboutfoolproof.com

MARKETING SUPPORT

www.foolproofnational.com/co-wy

ADDITIONAL INFORMATION

Contact Diane Goss for more information at dgoss@foolproofhq.com or 303.579.4399.



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PRODUCT

El Poder Es Tuyo

AUDIENCE

Hispanic Market

OFFERED BY

Coopera Consulting and Credit Union National Association

COST

Based on asset size. Generally \$750 to \$1,500 annually.

MATERIALS

Website with articles, worksheets, videos, and more.

WEBSITE

finlit.cuna.org/tuyo.html

MARKETING SUPPORT

Contact Coopera Consulting at 866.518.0214 or info@cooperaconsulting.com.

ADDITIONAL INFORMATION

Contact Coopera Consulting at 866.518.0214 or info@cooperaconsulting.com.



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PRODUCT

Accel

AUDIENCE

All credit union members

OFFERED BY

CUNA Strategic Services

COST

Unavailable

MATERIALS

BudgetSmart software. Accel offers full-service counselors including “**Banking Is**” - a reference for housing counseling and debt management.

WEBSITE

www.greenpath.com

MARKETING SUPPORT

Accel offers on-site workshops, “train the trainer” sessions, materials and co-branded materials for purchase, and develops a marketing plan.

ADDITIONAL INFORMATION

You must sign an Accel agreement before participating. For more information, call 877.332.2235 or visit www.accelservices.org.



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PRODUCT

Balance

AUDIENCE

All credit union members

OFFERED BY

Purdue University-certified credit counselors on staff. Based in San Francisco, CA.

COST

Contact Jack Rinaldini at 800.808.4327 x249

MATERIALS

There is free over-the-phone counseling available Monday – Saturday called “InfoLine.” Balance also includes money management counseling sessions, money management planner budget forms, and debt management counseling.

WEBSITE

www.balancepro.net

MARKETING SUPPORT

Balance will work with marketing departments and will conduct on-site orientation.

ADDITIONAL INFORMATION

The program provides funding to the National Credit Union Foundation, with services available in five languages.



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PRODUCT

Jump\$tart Coalition Clearinghouse

AUDIENCE

All credit union members

OFFERED BY

National Jump\$tart Coalition

COST

Varies from free to cost

MATERIALS

Varies, clearinghouse includes information on the publisher and costs.

WEBSITE

www.jumpstart.org/search.cfm

MARKETING SUPPORT

Please visit www.jumpstart.org/search.cfm for more information and a listing of marketing support services.

ADDITIONAL INFORMATION

The program is not credit union specific.



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PRODUCT

Debt in Focus

AUDIENCE

All credit union members

OFFERED BY

Filene Research Institute

COST

Filene non-member: \$1,199 per year

Filene member: \$599 per year

\$150 one-time set up fee

MATERIALS

Online anonymous financial assessment.

WEBSITE

www.filene.org/debtinfocus

MARKETING SUPPORT

Customizable for credit union.

ADDITIONAL INFORMATION

Contact Matt Davis for more information at mattd@filene.org or 336.416.6330.

