Chair Kit
2019

**Check for the latest updates and revisions to the Chair Kit at http://www.MoneySmartWeek.org/**
Table of Contents

Introduction ........................................................................................................................................... 4

What is Money Smart Week? ............................................................................................................... 4

How Did It Get Started? ....................................................................................................................... 4

Where Do Money Smart Week Campaigns Take Place? ................................................................. 4

Why Money Smart Week? ................................................................................................................ 5

The Role of a Chairperson in Money Smart Week.............................................................................. 5

Conducting a Money Smart Week Campaign ...................................................................................... 5

Overview ............................................................................................................................................. 5

Chairperson Role & Responsibilities ................................................................................................. 6

Support provided to Regional MSW Campaigns by the Federal Reserve Bank of Chicago ............ 7

Money Smart Week Partner Guidelines and Responsibilities .......................................................... 7

Money Smart Week Partner Guidelines .......................................................................................... 7

Ethics .................................................................................................................................................... 7

Money Smart Week Partner Responsibilities .................................................................................. 7

Event Marketing and Operations........................................................................................................ 7

Surveys and MSW Event Information ............................................................................................... 8

About Money Smart Week ................................................................................................................ 8

How do I sign up to be a Money Smart Partner? ............................................................................ 8

Committee Descriptions, Roles & Responsibilities .......................................................................... 9

College & University Committee ....................................................................................................... 9

Kick-Off Committee .......................................................................................................................... 9

Measurement Committee ................................................................................................................ 9

Media Committee ................................................................................................................................ 9

Money Smart Kid Committee ......................................................................................................... 9

Programming/Curriculum Committee ............................................................................................... 9

Promotion Committee ..................................................................................................................... 10

Workplace .......................................................................................................................................... 10

Money Smart Kids ............................................................................................................................ 10

Chair Call Schedule .......................................................................................................................... 11

Money Smart Week 2019 Campaign Chair Call Meeting Dates .................................................... 11

Online Calendar .................................................................................................................................. 11

Questions or comments can be directed to: money.smart@chi.frb.org
Questions or comments can be directed to: money.smart@chi.frb.org
Introduction

What is Money Smart Week?

Money Smart Week is an annual public awareness campaign designed to help consumers better manage their personal finances. This is achieved through the collaboration and coordinated effort of thousands of organizations across the country including businesses, financial institutions, schools, libraries, not-for-profits, government agencies and the media. These groups come together to:

- Stress the importance of financial literacy
- Inform consumers about where they can get help
- Provide free educational seminars and activities throughout the week.

Programming is offered to all demographics and income levels and covers all facets of personal finance from establishing a budget, to first time home buying, to estate planning. Money Smart Week takes place in the spring, during the week designated by the Federal Reserve Bank of Chicago. The exact dates vary from year to year.

How Did It Get Started?

Money Smart Week began as a coordinated effort of the Federal Reserve Bank of Chicago and the Money Smart Advisory Council — a diverse group of more than 40 Chicago-area organizations working together to promote personal financial literacy. Members agreed to share resources and ideas to achieve greater public awareness of the programs and services available in the city of Chicago. The result was Money Smart Week 2002, a week of 40 financial seminars and educational activities. The effort would showcase different programs, help consumers get information, bring together different organizations — many for the first time — and help these organizations share expertise and leverage limited resources. The Money Smart Week model has since spread throughout the country with successful campaigns in 41 states.

Where Do Money Smart Week Campaigns Take Place?

Money Smart Week campaigns continue to expand throughout the country. The Federal Reserve Bank of Chicago acts as an advisor to new campaigns and provides planning and promotional tools such as the website, logos, best practices, media kit templates and more to all registered MSW Partners and Chairs.

Questions or comments can be directed to: money.smart@chi.frb.org
Why Money Smart Week?
The Federal Reserve Bank of Chicago fully endorses financial education and believes in the idea that individuals and families can positively impact their well-being and the larger economy as a collective, when they make informed decisions about how they spend, save and invest their money. The Federal Reserve is at the core of the financial system with a multitude of financial and non-financial relationships and external partners.

The Role of a Chairperson in Money Smart Week
Money Smart Week is a success due to the support provided by our dedicated Chair people. Our Chair people are the local organizers and face to the community.

Conducting a Money Smart Week Campaign

Overview
Money Smart Week campaigns take place in communities where organizations interested in financial education and wellbeing come together to plan and carry out free events during the week designated by the Federal Reserve Bank of Chicago. Campaigns are chaired or co-chaired by volunteers from partner organizations.

Money Smart Week activities can include but not limited to:

- A kick-off event to launch the week, garnering media attention, and getting the word out about the upcoming week of events.
- Face-to-face educational programs taught by MSW partner organizations. These can be open to the public or provided to a specific group, such as a membership organization, clientele of a social service agency, or employees at their workplace.
- Fairs or exhibits providing financial information.
- Webinars, conference calls, or social media events.
- Money Smart Week Kid essay contests

Under the leadership of the local MSW chair or co-chairs, the partners may organize into committees to plan and implement these activities and related tasks.

Questions or comments can be directed to: money.smart@chi.frb.org
Chairperson Role & Responsibilities

Chairpersons are volunteer partners that serve as a liaison to the Federal Reserve Bank of Chicago and lead local planning teams. Planning teams often have co-chairs to divide responsibility and facilitate leadership transition. The local planning team is free to develop term limits, nominations and voting procedures but is not required.

Below are the main objectives:

- Serve as the primary point of contact for local partners with assistance from staff when needed.

- Ensure partners submit attendance numbers, consumer surveys and photos/captions for reports. Dial in to monthly chairperson conference calls to receive updates and deadlines from the Federal Reserve Bank of Chicago and other chairs around the country.

- Communicate updates, deadlines and announcements to partners via email, planning meetings, etc.

- Coordinate and lead up to six planning meetings between Oct - March to keep campaign on track. Monthly chairperson calls will provide content and agenda items for meetings.

- Align individual partners or planning teams with official Money Smart Week National Champions.

- Help form and support committees and committee chairs as well as ensure they are meeting required objectives throughout the planning phase.

- Ensure partners have all the tools and resources required to plan/schedule events, add to the online calendar, promote events and report outcomes.

- Connect partners to promotional resources available through the Money Smart Week website including logos and materials for download.

- Oversee any fundraising activity to ensure money is acquired according to the chairperson kit.

- Serve as media spokesperson and advocate to the community as needed. Our planning group can also assist in this role.

- Help facilitate new strategic partnerships and grow the effort when/where possible.

- Uphold the mission and values of Money Smart Week including the requirement that no partner sell products or services, ensure a wide variety of programming is available to consumers, and encourage partnerships and collaboration among participating organizations.

Questions or comments can be directed to: money.smart@chi.frb.org
Support provided to Regional MSW Campaigns by the Federal Reserve Bank of Chicago

The Federal Reserve Bank of Chicago provides support to regional campaigns and to the chairs in a variety of ways. Examples include:

- Webinars and instructional videos for chairpersons throughout the campaign, to discuss planning tasks and other coordinating efforts.
- Correspondence support from Chicago Fed staff and/or state MSW coordinators in states where coordinators have been provided.
- Promotional materials Money Smart Week branding and logos.
- Online calendar of events partners

Money Smart Week Partner Guidelines and Responsibilities

All Money Smart Week Partners are asked to adhere to the following guidelines as listed on the [MSW Partner Sign Up Page](http://www.moneysmartweek.org) and in the [MSW Partner Kit](http://www.moneysmartweek.org) (Page 5).

**Money Smart Week Partner Guidelines**

**Ethics**

- All workshops, seminars and activities should be educational in nature and actively support attendees in improving their knowledge, behaviors, and habits related to personal finances - from basic savings to advanced investment strategies.
- Sales pitches and/or commercial marketing are prohibited. Violators will be dismissed from the program in accordance with Federal Reserve policy.
- Workshops, seminars, and activities should be free and open to the public.
  - Private events are permitted for appropriate audiences such as students, employees, and professional groups, but will not be posted on the Money Smart Week public calendar on the website. The event should still be submitted on the Money Smart Week website so that a private event page and link can be created and shared with your attendees.

**Money Smart Week Partner Responsibilities**

**Event Marketing and Operations**

- Partners should provide vision, leadership, and general direction to third-party sponsors/presenters.
- Participating organizations should appoint a representative to manage Money Smart Week activities and to attend monthly planning meetings leading up to the event.
- Please submit Money Smart Week event information via the on-line application before Saturday, March 16, 2019. Otherwise, your event may not be included in promotions, etc.

Questions or comments can be directed to: [money.smart@chi.frb.org](mailto:money.smart@chi.frb.org)
- Partners should implement marketing and/or promotional materials for their individual events to build attendance. General Money Smart Week promotional materials will be made available to help with media efforts.

**Surveys and MSW Event Information**

- Partners should complete and submit event metrics to the Federal Reserve Bank of Chicago, including attendance numbers for all events, partner surveys, participant surveys, photos, media clips and samples of materials used during the campaign before **Friday, May 10, 2019**.

If there are questions regarding any of the above, please contact a Money Smart Week representative at the Federal Reserve Bank of Chicago (moneysmart@chi.frb.org).

**About Money Smart Week**

Money Smart Week is a public awareness campaign designed to help consumers better manage their personal finances. Programming is offered to all demographics, income levels, and covers all facets of personal finance. The campaign is coordinated by the Federal Reserve Bank of Chicago and programming is offered through the collaborative efforts of thousands of organizations across the country including financial institutions, schools, libraries, not-for-profits, government agencies and the media. Partnering organizations will host their events March 30th – April 6th 2019. For more information about events or becoming a Money Smart Week partner, please visit [www.moneysmartweek.org](http://www.moneysmartweek.org).

**How do I sign up to be a Money Smart Partner?**

All interested partners are required to register online and after Federal Reserve Bank of Chicago approval will become official partners. If approved, you will receive notifications, news, and updates from the Federal Reserve Bank of Chicago and from your local planning team.

1. Go to [www.moneysmartweek.org](http://www.moneysmartweek.org)
2. Click “Join” at the top of the page
3. Follow given directions to complete registration

Questions or comments can be directed to: moneysmart@chi.frb.org
Committee Descriptions, Roles & Responsibilities

(Committees and descriptions vary by regional planning teams and need)

Below are examples of committees and descriptions used by several planning teams across the country. Check with your local chairperson about committee opportunities in your area.

**College & University Committee**

Reaches out to colleges and universities to secure on-site programming for students. This committee develops a promotional strategy for reaching and encouraging students to participate in Money Smart Week activities at their school or in the community. Consider bringing GeoCache for College Cash to your local college or university as a fun way to gamify financial education for university students. Information can be found in the Partner Playbook at moneysmartweek.org.

**Kick-Off Committee**

Plans the kick-off event. This committee recommends and secures a venue, speakers, invitee list, agenda, room set-up and sponsor as needed.

**Measurement Committee**

Ensures Partners submit surveys as well as event attendance numbers. Additionally, this committee collects photos or promotional materials. The committee shares the data with the Federal Reserve Bank of Chicago for possible inclusion in the Money Smart Week annual report and on moneysmartweek.org.

**Media Committee**

Secures publicity through local television, radio, online, and print outlets. Pitches for coverage prior to and during the campaign. This committee creates a speakers bureau with experts who can be "on-call" to promote the week through the media.

**Money Smart Kid Committee**

Finalizes the essay contest question, rules and guidelines. Additional responsibilities include promoting the contest through the school system, securing prizes, reviewing submissions, determining finalists, and selecting a winner.

**Programming/Curriculum Committee**

Questions or comments can be directed to: money.smart@chi.frb.org
Works with Partners to determine available program topics/presenters and venues. The committee monitors details to minimize program duplication, as well as facilitate the scheduling of programs at libraries, schools, community centers, etc.

**Promotion Committee**

Promotes the week in the community and media. This group distributes of flyers, posters, bookmarks, statement stuffers, postcards or any other collateral materials. Materials are distributed through partner organizations, local schools and library systems, at festivals, fairs or sporting events, as well as high traffic areas of the city/county.

**Workplace**

Creates a strategy to reach businesses for on-site employee programming. This group will identify and schedule volunteer partners to conduct such events

**Money Smart Kids**

In many Money Smart Week campaigns, a committee of partners sponsor essay competitions for students to see if they are "Money Smart." A monetary prize to be used for college is usually awarded to the winner or finalists. MSW Partners may choose to contribute to the essay prizes, or solicit other sponsors. (See FRBC Policy on Soliciting Financial Support for Money Smart Week in the Appendix).

The Chicago Fed provides suggested essay questions for middle and high school MSW Kid Essay contests. The questions are posted on [www.MoneySmartWeek.org](http://www.MoneySmartWeek.org), along with links to guidelines and application forms for each regional MSW Kid essay contest.

Regional campaigns should notify the Chicago Fed by **Friday, November 30th** if they want a customized, MSKid application form (info page and application form) created for their regional contest. Application packets are posted under the Money Smart Kids tab on [www.MoneySmartWeek.org](http://www.MoneySmartWeek.org).

Questions or comments can be directed to: money.smart@chi.frb.org
Chair Call Schedule

Chair meeting dates for Money Smart Week 2019 are as follows, always at 2:00 PM CST.

Money Smart Week 2019 Campaign Chair Call Meeting Dates

Chair Call 1: Tuesday, October 2, 2018, 2pm CST
Chair Call 2: Tuesday, November 13, 2018, 2pm CST
Chair Call 3: Tuesday, December 4, 2018, 2pm CST
Chair Call 4: Tuesday, January 15, 2019, 2pm CST
Chair Call 5: Tuesday, February 5, 2019, 2pm CST
Chair Call 6: Tuesday, March 5, 2019, 2pm CST

Online Calendar

Entering Events

As a registered Money Smart Week Partner, Money Smart Week provides partners with the ability to upload events online to populate a searchable calendar for consumers. Some planning teams and states use this information to make print calendars. All regions are encouraged to promote the online database to consumers who then can RSVP to classes directly on the database.

Here are the initial steps to access the database:

1. Go to www.moneysmartweek.org

2. Hover over the Event button at the top of the page.

3. Select “Start an Event” from the drop down menu.

4. Login with your user name and password.

Before the planning meeting where you will discuss entering events into the calendar, ask each partner to try to enter one event. During your planning meeting, if possible, demonstrate entering an event. Remind partners to look at the FAQs tab at www.moneysmartweek.org.

Money Smart Week Evaluation

Questions or comments can be directed to: money.smart@chi.frb.org
As Money Smart Week partners we ask that at the conclusion of Money Smart Week you complete and return attendance numbers for all events, partner surveys, participant surveys, photos, media clips and samples of any other promotional materials used during the campaign. The surveys are an important tool for us to obtain consumer feedback. We ask that you take attendance and collect consumer surveys at each of your events and submit that information by Friday, May 10, 2019.

Post event surveys are emailed to consumers who RSVP’d on the website. For all other consumers, paper surveys will need to be printed and distributed at events.

**Attendance**

Post-event attendance emails are triggered once an event concludes and reminders are sent to the individual who created the event in the online calendar until a number is entered (even if the number is “0”). Reminders will be sent in cadences of 15 minutes after end of event, 3 days after event, 1 week after event, and a final reminder.

**Highlights**

Submit event pictures with names, dates, places, etc. by Friday, May 10, 2019. These action shots will be used in the Annual Report.

Questions or comments can be directed to: money.smart@chi.frb.org
Media and PR

Logos and Infographics

Logos can be placed on a wide array of materials to promote Money Smart Week activities. The official Money Smart Week logos can be downloaded from http://www.moneysmartweek.org/partners_resources#logos.

Logos should be used without modification.

Marketing & Promotional Materials

Money Smart Week national champion, the Consumer Financial Protection Bureau (CFPB), has agreed to print and ship the following Money Smart Week promotional materials to Money Smart Week partners at no cost. Available materials can be ordered here.

The CFPB also offers an array of free financial educational materials. Partners are encouraged to order any supplemental materials from http://promotions.usa.gov/cfpblibraries.html.

Money Smart Week promotional files are also available for download at http://www.moneysmartweek.org/newsroom#logos

Postcard

This evergreen piece can be used year-round to promote the Money Smart Week website and educational resources.

Questions or comments can be directed to: money.smart@chi.frb.org
**Posters/Flyers**

Available sizes are either 8 1/2” x 11” or 11” x 17” and come in two versions: customizable and "ready to go" (print-ready). Below is the print-ready version.

![Posters/Flyers Image](image)

**Bookmarks**

Bookmarks are normally distributed through local schools and libraries.

Questions or comments can be directed to: [money.smart@chi.frb.org](mailto:money.smart@chi.frb.org)
Statement Stuffer

Inserts are typically used as invoice/billing statement stuffers or distributed to customers at local retail venues such as bank teller windows, in grocery bags or with pizza deliveries, etc. Front and back of statement stuffer.
Guidelines for Using MSW Logos and Text

Below are guidelines for appropriate use of the Money Smart Week® logos and text.

**Logo Standards**

1. The logo should always be printed in either color (PMS 343) or black and white. When posted on the web, the logo should always appear in color.

2. Graphics and designs should never be removed or altered from the approved logos.

3. Logos should always be situated right-side-up and never represented at a diagonal or other angle.

4. For web usage only, apply ALT Tag (Alternative Text) to allow accessibility to people with disabilities.

5. The logo size can be adjusted to accommodate any publication or print job, however the logo should never decrease in size so much that the text becomes unreadable.

6. Decision to use the primary or secondary logo should depend upon the needs of the materials being designed.

**Text Standards**

The phrase "Money Smart Week," when it appears in text should always be:

- Three words
- Title case — M(oney), S(mart), and W(eek)
- Represented with an alphabetical "S" for Smart — not the dollar sign ($)
- Include the registration mark ® in superscript the first time it is used in a document
- Include the phrase "Money Smart Week is a registered service mark of the Federal Reserve Bank of Chicago" on all documents using the service mark notation. As this phrase is already contained within ChicagoFed.org's legal notices, it is not necessary to post this phrase on the Bank's Web site.

Questions or comments can be directed to: money.smart@chi.frb.org
Tools and Best Practices

Events

Creative Events/Topics:
- How to Find a Great Job and Increase Your Earnings
- Health Savings Through Exercise
- Savvy Shopping
- Surviving Divorce Financially
- Charitable Giving
- Couponing 101: Getting the Most for Your Money
- Protect Yourself Against Fraud & Scams
- Community Shred Day
- Free Financial Counseling for a Day

Ways to Increase Attendance

Activity Hubs
Use one or more facilities that host the majority of events multiple times a day to increase the likelihood of participants attending more than one class. Schools, libraries or community centers have been the most successful venues.

Participation

Workplace: Reach out to local Human Resource Managers and offer to host free money management sessions for employees as a way of sharing Money Smart Week’s message while linking employees with MSW partners and presenters.

Not-for-Profit Clients: Invite Executive Directors from local agencies to hear Money Smart Week message and link clients with MSW partners/presenters.

Money, Prizes & Food: Door Prizes; food and refreshments; registration to win cash or a savings bond when you attend a class and fill out a survey.

Extra Credit: Teachers and professors give extra credit for attending classes and submitting a report.

Media & Promotion
- Newspaper partner to print and distribute calendars
- MSW promotional materials
- Operation Greenlight (turning building façade or exterior lights green)
- Invite local media to Money Smart Week and cover event
- Media personality to Emcee kick-off or other event

Questions or comments can be directed to: money.smart@chi.frb.org
Title Writing Tips

It is important to make sure you use a title that is both attention grabbing and informative.

Tips:

1. Be specific. Give readers a clear idea of the class or activity.

2. Use numbered steps/ideas to give readers a clearer idea of how the class will be taught
   Ex: “4 Things Everyone Must Know About Mortgages”, “3 Steps to Managing Credit Card Debt.”

3. Ask a question to peak interest.
   Ex: “You Just Graduated High School. Now, it’s time for College. Are You Ready?”

4. Use ‘power words’ and phrases to draw the reader’s attention and give them a clear idea of
what the class will consist of. Discover, learn, how-to, explore and create are all examples of
power words.

Sample Session Titles
- Homeownership
- How to Invest
- Paying for College
- Save for the Future

Enhanced Session Titles
- The ABC’s of Homeownership
- Smart Investing: Allocating your Investments and Rebalancing Your Portfolio
- How are We Ever Going to Pay for College?
- Making your Nest Egg Last a Lifetime

APPENDIX

Policies and Procedures

Federal Reserve Bank of Chicago (FRBC) Policy on Soliciting Financial Support for Money Smart
Week®

Overview: Money Smart Week® (MSW) is a public awareness campaign designed to help consumers
better manage their personal finances. This is achieved through the collaboration and coordinated
effort of hundreds of organizations throughout the country including businesses, financial institutions,
schools, libraries, not-for-profits, government agencies and the media. These groups come together
once a year to stress the importance of financial literacy, inform consumers where they can get help
and provide free educational seminars and activities. Programming is offered to all demographics and
income levels and covers all facets of personal finance from establishing a budget, to first time home
buying, to estate planning.

Questions or comments can be directed to: money.smart@chi.frb.org
Policy Statement: Money Smart Week® partners and planning teams may raise funds and solicit sponsorship of MSW events, materials and activities independent of the FRBC. Direct sponsorship requests and fundraising that is conducted with little to no involvement from the FRBC must be in compliance with this policy.

Solicitation of Financial Support: Two models are available to MSW planning teams to use in soliciting financial support for MSW. The first involves partners directly contacting the media for support in funding promotional materials (direct sponsorship). The second is a pooled dollar model where the partners pool all MSW fundraising dollars and the partners as a group decide how to divide the dollars raised to support MSW (pooled funds). If a MSW partner or planning team wishes to use a different means of seeking financial support for MSW, it must provide, in advance, the details of its proposal to the FRBC and receive FRBC’s prior approval.

Direct Sponsorship: The direct sponsorship model can be initiated by the FRBC and/or each planning team. If initiated by the planning team, guidelines about equal access to sponsorship opportunities should be defined by the planning team. If initiated by FRBC, an open call for sponsorships must be made to all participating organizations. For example, if the local newspaper is offering to promote MSW with a paid (usually discounted) insert, all partners must have equal opportunity to fund the publication entirely or as one of multiple sponsors who can purchase ad space within the insert. While the FRBC will have no involvement in the transaction of money once these partner/media relationships are established, it will still maintain an advisory role for content and graphics. Furthermore, the FRBC requires that ads sold within the insert are appropriate and in good taste. Banks may purchase ad space; however, a disclaimer provided by the Fed will be added to absolve the Fed from any support or endorsement of sponsors. The FRBC may, at its discretion, act as a bridge solely to help establish a connection between the potential sponsor and a media partner.

The FRBC may request sponsorship of promotional materials produced by the Fed including the calendar of events booklet, bookmarks, inserts, posters and/or t-shirts. Partners may sponsor pages within those promotional materials that highlight their support of financial education/MSW and/or their planned MSW activities. Sponsorship levels will not be established. Rather, potential sponsors will be informed of the dollar amount range that past sponsors have provided. It will be up to the sponsor to decide based on that information, its sponsorship level. Sponsors that contribute toward the higher end of the sponsorship range; however, may negotiate more prominent placement within the calendar of events booklet. As with media promotional buys, the Fed will not be responsible for any money transactions. Sponsoring partners must work directly with the print vendors to settle sponsorship dollars.

Planning teams may also solicit sponsorship of MSW contests. The rules outlined in this policy apply to contest sponsors. Contest sponsors such as those for the Money Smart Kid scholarship or savings bond raffle will be listed in a factual nature online, in all promotional materials and mentioned in talking points, as well as be allowed to announce contest winners at Fed activities such as the MSW kickoff breakfast.

Questions or comments can be directed to: money.smart@chi.frb.org
**Pooled Dollars:**
The pooled dollars fundraising model must be conducted entirely independent of the FRBC. Recommendations for this type of sponsor participation include:

- An independent (preferably) or partner non-profit should be chosen by whatever means deemed fair and appropriate among all partner organizations to serve as the fiscal agent for MSW funds. The fiscal agent maintains responsibility to account for the collection and use of all fundraising dollars.
- The account should have multiple signers from at least two (2) different partner organizations.
- Dollar goals and needs should be established by consensus and thorough analysis of costs.
- Full disclosure and monthly reports on all funds should be provided to the partner group. These reports should include the details of each individual deposit and withdrawal (name of organization and dollar amount).
- Decisions regarding the fiscal agent should be shared with the partner group at a regular meeting within 30 days of the decision being made.
- A written voting structure should be in place for all decisions that require spending allocated funds.
- Funds should be restricted to marketing and promotional efforts as well as support for events and/or speaker fees.

Marketing and promotional efforts should be in good taste and embody the mission of Money Smart Week®. They should not disparage any legal and legit sectors of the financial industry.

**Financial Solicitation Restrictions:** In soliciting support for MSW, partners and planning teams must always maintain a neutral position and never use the name of the Federal Reserve Bank of Chicago or the Federal Reserve System to coerce contributions or support. The FRBC will not endorse any sponsors beyond recognizing their involvement in MSW. The FRBC should be given the opportunity to review any outside promotional campaigns, advertisements and messaging that will be linked to or associated with Money Smart Week® campaigns. Any material that is deemed not appropriate by the FRBC and/or the MSW partners’ group at large will not be allowed to be used for MSW or include the Money Smart Week® logo or affiliation.

**Federal Reserve Bank Trademarks and Service Marks:** Money Smart Week® is a registered service mark of the Federal Reserve Bank of Chicago and it may not be used without the FRBC’s express written permission. Other trademarks and service marks owned by the Federal Reserve Banks also may not be used without express written permission from the owner of the mark.

Money Smart Week is a registered service mark of the Federal Reserve Bank of Chicago.

Questions or comments can be directed to: money.smart@chi.frb.org
Suggested opening script for adult MSW Events:

Welcome to [name of your event]. [Details about your event].

**Description of class/activity:** Note how it is one of thousands of free financial education events that occur all over the country amongst financial institutions, government agencies, non-profits, etc. in connection with Money Smart Week, created by the Federal Reserve Bank of Chicago.

**Disclaimer:** Because this is a Money Smart Week event, all content will be void of sales pitches and will not refer to my company’s/organization’s products or services unless used as an example or asked about by participants.

**Survey:** If you RSVP’d through the Money Smart Week website, you will receive a short survey via email. If not, or in addition, I have provided paper copies to each of you. We ask that you take a few minutes at the conclusion of the class to provide some feedback about today’s discussion as well as how you heard about us. Your opinions are very important to us and will be used to maintain the quality of our program.

**Consumer Sign-Up:** To join our mailing list, sign up at moneysmartweek.org. We’ll keep you informed of future campaigns as well as other free financial educational events. You will not be solicited by signing up.

Questions or comments can be directed to: money.smart@chi.frb.org
Example Planning Meeting Agenda

2019 Planning Meeting X
Thursday, December X
9 a.m.
[Insert location here]

AGENDA

9 – 9:10 a.m.
Individual Introductions and Go-around .................................................................All

9:10 – 9:20 a.m.
Campaign Updates ........................................................................................................[Name of presenter]
(Kickoff, Deadlines, Discussion Forum, Resources Survey)

9:20 – 9:35 a.m.
Event Calendar Database/Website .................................................................[Name of presenter]

9:35 – 9:40 a.m.
Leadership Report ....................................................................................................[Name of presenter]

9:40 – 9:55 a.m.
Committee Reports/Announcements .................................................................Committee Chairs/All

9:55 – 10:00 a.m.
Open Discussion and Partner Announcements ......................................................All

Questions or comments can be directed to: money.smart@chi.frb.org
Contact Information

For regional chairperson contact information, please [CLICK HERE](mailto:money.smart@chi.frb.org)