WHY PARTNER WITH FB?

PARTNERSHIP WITH FINANCIAL BEGINNINGS WILL...

- Strengthen your visibility through financial education volunteer engagement across multiple communities, assessment areas, and regions.
- Expand your company's financial education outreach to diverse communities.
- Streamlined coordination, alignment with your unique goals, and impactful service delivery in targeted regions.

WE ARE SOCIAL IMPACT

When companies partner with Financial Beginnings, you can be confident that your partnership is reinvested in the community. We are a volunteer-powered nonprofit organization serving low to moderate income communities nationally. **Your partnership goes right back into service to educate your communities.**

ADDITIONAL PARTERNSHIP SERVICES & BENEFITS INCLUDE...

- Dedicated access to Financial Beginnings staff
- Visibility on FB materials
- Access to co-brandable, licensable curricula
- CRA-qualifiable impact reporting for banks
- Pre/Post Surveys
- Additional training
- ...And more!

BRINGING FINANCIAL EDUCATION TO UNDERSERVED COMMUNITIES SINCE 2005

Contact Us to Learn More
Roxanne Myslewski | 415.823.7399 | roxanne.myslewski@financialbeginnings.org

BASIC PARTNERSHIP

Financial Beginnings empowers youth and adults to take control of their financial futures. We do this through the power of dedicated volunteers, expert training, community partnerships, and best-in-class curriculum. We reach more than 35,000 youth and adult learners annually, and growing.

Both investment and volunteerism with Financial Beginnings are CRA-qualifiable. We prioritize serving low to moderate income (LMI) learners, reaching an average 65%+ LMI learners annually.

PARTNERSHIP WITH FINANCIAL BEGINNINGS WILL...

- Strengthen your financial education volunteer engagement across your assessment areas/regions.
- Expand your organization’s financial education outreach to diverse communities.
- Streamlined coordination, alignment with goals & priorities, and impactful service delivery in targeted regions.

ANNUAL PARTNERSHIP Single State Delivery	Included
Access to In Person or Virtual Financial Education Volunteer Opportunities	✓
Custom Curricula Facilitation Training(s) for Your Company’s Volunteers (+ Recording)	1 Training
Partnership Impact Reporting	Annual
ANNUAL PARTNERSHIP COST	$5,000

INCLUDED IN PARTNERSHIP:

- Access to Financial Beginnings’ volunteer portal for in-person and virtual volunteer opportunities in your region
- Annual partner impact reporting
- Shipping and communications support with host partner organization requesting financial education

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ADDITIONAL PARTNERSHIP SERVICES

LOOKING FOR MORE? PROFESSIONAL SERVICE CONSULTATION IS AVAILABLE!

Our expert team can help your organization achieve your goals through custom strategies, community liaison support, additional trainings, comprehensive reporting, and consulting to ensure you meet your community impact objectives. FB is able to tailor partnership depending on your organization's specific needs - just ask us how!

EMPOWER YOUR TEAMS & COMMUNITIES THROUGH ENHANCED VOLUNTEERISM

BENEFIT	GOLD	SILVER	BRONZE
Access to In Person or Virtual Financial Education Volunteer Opportunities	✓	✓	✓
Custom Curricula Facilitation Training(s) for Your Company's Volunteers (+ Recorded)	Four	Two	One
Dedicated staff time monthly	Up to 15 hours	Up to 10 hours	Up to 5 hours
Virtual one-hour meetings to maintain alignment and provide program updates	Twice per Month	Monthly	Quarterly
Relationship-building and engagement support between Financial Beginnings and key community contacts	✓	✓	✓
Comprehensive impact reports	On Demand	Bi-Annual	Annual
ANNUAL PROFESSIONAL SERVICE COST	**$25,000**	**$15,000**	**$10,000**

BENEFITS

Additional professional service support provides your organization with volunteer program management, including:

- Host Identification & Outreach
- Class Planning & Materials Logistics Coordination
- Volunteer Coordination, Scheduling, and Training
- Impact Reporting (including CRA alignment consultation)

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SPONSORSHIP VISIBILITY

Visibility on Materials & Content	Gold	Silver	Bronze
Visibility on Nationally Distributed Learner Workbooks (~42,000)	Inside Front Logo	Back Logo	✕
Social Media Engagement: One post per FB channel linking sponsor company with our thanks	✓	✓	✕
Access to FB Staff for Your Community Partners to Receive Financial Education	Four Community Partners	Two Community Partners	✕
Access to Financial Beginnings volunteer training and placement support	✓	✓	✓
Visibility on National Volunteer Emails & Monthly Newsletter	Large Logo	Small Logo	Small Logo
Recognition on FB Website	✓	✓	✓
Annual Sponsorship	$50,000	$25,000	$10,000

SPONSOR EXAMPLE

XYZ FINTECH

To demonstrate their commitment to financial education for underserved communities, XYZ FinTech sponsored Financial Beginnings at the Gold level, placing their logo on our nationally distributed learner workbooks, and connecting their current nonprofit partners with our financial education services, doubling their impact for their partners and marketing goals.

CUSTOM SPONSORSHIP & VISIBILITY OPTIONS AVAILABLE

CONTACT US TO LEARN MORE

LICENSE CURRICULA

LICENSE ACCESS TO FB CURRICULUM

We design financial education curricula that center the learner and exceed the latest national standards of the Jump$tart Coalition. Partners may choose to license annual access to digital print files of the full suite of Financial Beginnings' K-adult financial education programming (28 modular lessons across six distinct curriculum).

Licensing is a flexible option, best for organizations interested in co-branding curricula and having your staff facilitate lessons on your own timeline at your own discretion. Pricing is based on number of programs and delivery region.

Program License - Single State Delivery	Annual Cost
One Curriculum - Complete Program	$5,000

Included in Licensing:

- Digital design files of all learner materials (editable for company to co-brand with brand markings, verbiage, and logo), including workbooks, presentation slide decks, and presentation guides for facilitators
- Custom training for organization employees to deliver curricula in classrooms/in partnership with your community-based organizations
- Video walk-throughs of Presentation Guides
- Pre and post surveys to assess learning

Licensing Discounts

- 5% discount per curriculum licensed (see curricula info sheet for full program inclusion)
- 25% discount on additional staff support for Professional Service levels
- Multi-year discounts available, based on term of agreement

LICENSE EXAMPLE

ABC NATIONAL BANK

National Bank licenses our Financial Footings program, for elementary students aged kindergarten through 5th grade. The Bank wanted to co-brand this curriculum as their own, have easy access to print and share, and leverage their employees as national volunteers. Via their Financial Wellness Hub, employees can download the slide decks, materials, and presentation guides, receive custom training from the FB team, and plug directly into their community relationships.

INTRODUCTORY PILOT LICENSE OPTIONS AVAILABLE
CONTACT US TO LEARN MORE

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LICENSE FINANCIAL EDUCATION CURRICULA

Customizable Licensing Packages – How It Works

Together, we design custom licensing packages to help your organization deliver the highest quality financial education at a fraction of the cost to develop and implement in-house. License programming for only the curricula you need, or access our whole suite. Pricing is based on selected curricula and size of delivery region. Contact us to learn more!

Licensing Benefits Include

- Co-branding opportunities on materials
- Access to training modules on program delivery instruction
- Access to workbooks, supplemental activities, and more
- Employee engagement through volunteerism
- À la carte consulting and training from our team of experts
- Meets Community Reinvestment Act (CRA) requirements

SELECT PROGRAMMING INCLUDES:

Presenter and participant guides, instructional slides, and any supplemental activities.

FINANCIAL FOOTINGS®	**Elementary School** *Avail. in Spanish*	Introduces youth to the world of personal finance. All the basics are covered including needs vs. wants, identifying coins and dollars, and the fundamentals of budgeting.
FINANCIAL FRAMINGS®	**Preteens and Middle School**	Helps individuals frame personal financial decisions within the local and global economies, focusing on topics like scarcity, interest rates, and savings through an interactive game.
FINANCIAL FOUNDATIONS®	**Teens and High School**	Provides details about key financial concepts, such as budgeting, credit, investing, liability, and the benefits of financial institutions.
PATHWAYS®	**Teens and Postsecondary Education**	Helps learners successfully transition from high school to postsecondary education (and beyond) through informed and proactive financial decisions. Pathways helps learners navigate career, continuing education, and personal money management.
SAFE	**Adults** *Avail. in Spanish*	Provides adult learners with tools and strategies to enhance personal financial wellness and achieve greater stability.
FORWARD	**Adults**	Combines group learning and hands-on activities to empower economically vulnerable adults to mitigate debt, establish savings, and increase their financial stability, to protect income, shelter, and insurance when cash is short.

Best-In-Class Curricula – Inclusion at the Center

Financial Beginnings updates its curricula annually to ensure programming remains relevant to learners' needs and grounded in instructional design best practices, state education standards, and the latest financial education research. With a focus on accessibility and learner success, Financial Beginnings ensures all materials are designed to engage individuals from a wide range of backgrounds and income levels.

EMPOWERING LEARNERS SINCE 2005

- **400,000+** individuals educated
- **1,500+** schools and community partnerships nationwide
- **3,200** professional volunteers delivering Financial Beginnings curricula
- **50,000+** curricula downloads
- **65%+** LMI learners

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FB ONLINE

The Financial Beginnings Online eLearning platform is a valuable learning resource that expands access to comprehensive, high-quality financial education. Our flexible platform allows learners to complete courses at their own pace—anytime, anywhere.

FIVE CORE COURSES

Setting Goals with a Growth Mindset *empowers learners to approach personal finance with a growth mindset, and demonstrates how to transform aspirations into actions using the "SMART" method of goal setting.*

Managing Income *introduces money-management tools learners can use to develop productive spending habits and build sustainable wealth.*

Building Credit & Breaking Down Debt *shows learners how to use credit and debt to their advantage and how to avoid risks by understanding key terms and conditions.*

Growing Wealth *explores various saving and investing strategies and the long-term financial benefits of growing wealth over time.*

Protecting Assets *highlights different types of insurance and the financial advantages of having coverage. Learners also gain insight into safeguarding their assets from fraud.*

FB ONLINE ACCESS	ANNUAL COST
FB Online Per Seat with Annual Group Reporting + PACKAGED WITH PARTNERSHIP SERVICES:	$50/seat
FB Online Per Seat with Annual Group Reporting - WITHOUT PARTNERSHIP SERVICES:	$75/seat
Unique Company "School"- Custom Reporting Access: Up to 2,000 seats*	$25,000

**Need more seats? Ask us about custom pricing for larger Schools*

Courses Added Regularly!

FB Online includes lessons and courses in community-suggested topics such as:

- First Time Homebuying
- The Benefits Cliff
- Debt Collection
- Safe & Wise Car Buying
- ...And more!

COMMITMENT TO QUALITY

Our courses go through rigorous vetting to ensure that they are:

ACCURATE: Based on input from personal finance subject matters and extensive research.

RELEVANT: Focused on practical knowledge and skills that reflect the current financial landscape.

INCLUSIVE: Use inclusive language, diverse storytelling, and emotional intelligence to respect the needs of all learners.

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VOLUNTEERISM - WHAT TO EXPECT

Empowering youth and adults to take control of their financial futures

Whether you want to teach in a classroom, connect with community groups, or help expand our reach in your communities and networks, our Financial Beginnings team makes it simple to get involved. Our step-by-step process prepares you to feel confident, supported, and ready to make a lasting impact.

ESTIMATED TIMELINE - FIRST INFO SESSION TO FIRST CLASS: 4-6 WEEKS

Week 1 - Information Session

A short, high-impact webinar introducing you to Financial Beginnings, our mission, the communities we serve, and the volunteer opportunities available. Includes Q&A so you can connect our work to your own interests and experience.

Week 2 - Volunteer Orientation and Setup

A 90-minute online session covering our mission, audiences, expectations, and program delivery. You'll gain access to our volunteer portal, where you can schedule classes, download materials, and manage your profile.

Week 3 - Preparation and Shadowing

Optional shadowing or program deep dives to build confidence and see our programs in action before you present.

Week 4 - Volunteer Ambassador Program (VA) Introduction

*We offer **Volunteer Ambassador Program (VA)** training for volunteers who want to create their own opportunities to bring financial education to their communities. The VA training equips you to:*

- ***Community Connection** – Building relationships with schools, nonprofits, and create opportunities in rural or marginalized communities.*
- ***Leadership & Initiative** – Identify partners, coordinate sessions, and introduce Financial Beginnings programs.*
- ***Extra Training** – Gain additional facilitation, outreach, and liaison skills.*
- ***Recognition** – Be featured in Financial Beginnings communications and impact reports.*

Week 4-5 - Class Selection and Scheduling

Choose in-person or virtual sessions that fit your schedule—we'll handle logistics and materials.

Week 5-6 - Ongoing Volunteer Opportunities

By this stage, you're ready to present. You can begin leading sessions in classrooms or community settings and keep choosing opportunities throughout the year to make an ongoing impact.

Week 5-6 - Ongoing Support and Impact Sharing

We provide email reminders, host introductions, responsive support, and updates on your impact—helping you see the difference you're making.

Take the first step today!
Contact us to begin your journey with Financial Beginnings.

Senior Manager, Volunteer Experience and Partnerships
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