

# WHY PARTNER WITH FB?

## PARTNERSHIP WITH FINANCIAL BEGINNINGS WILL...

- Strengthen financial empowerment among the learners and clients you serve
- Change the lives and futures of youth and adults in your community
- Provide your organization with impact reporting and data to demonstrate to your stakeholders the incredible impacts you're making



## WE ARE SOCIAL IMPACT - LIKE YOU!

When organizations 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.**

A STRONGER TOMORROW THROUGH FINANCIAL EDUCATION TODAY.



**FINANCIAL  
FOOTINGS®**

Elementary  
*Avail. in Spanish*



**FINANCIAL  
FRAMINGS®**

Middle School



**FINANCIAL  
FOUNDATIONS®**

High School



**PATHWAYS®**

Post Secondary



**SAFE**

Adult  
*Avail. in Spanish*



**FORWARD**

Economically  
Vulnerable Adults

**BRINGING FINANCIAL EDUCATION TO  
UNDERSERVED COMMUNITIES SINCE 2005**

Contact Us to Learn More

Roxanne Myslewski | 415.823.7399 | roxanne.myslewski@financialbeginnings.org



800-406-1876 | info@financialbeginnings.org

Empowering youth and adults to take control of their financial futures.

# LICENSING & VISIBILITY

## BUILD COMMUNITY RESILIENCE THROUGH FINANCIAL EDUCATION

We provide co-brandable financial education curricula that center the learner and exceed the latest national standards of the Jump\$tart Coalition. We train your staff to deliver this education to your communities and cohorts, and provide comprehensive learner surveys to ensure impact - changing lives.

Program License - Single State Delivery Only	Annual Cost
One Curriculum - Complete Program	\$3,000

### Included:

- Digital design files of all learner materials (editable for organization 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

## WANT TO TRY US OUT? PILOT AGREEMENTS AVAILABLE

Pilot Agreement - Duration	Annual Cost
One Year Pilot	10% Discount

## READY TO GO? SIGN UP FOR A MULTI-YEAR PARTNERSHIP & SAVE

Pilot Agreement - Duration	Impact Partner Discount
Two Year Agreement	\$2,500/program/year
3-5 Year Agreement	\$2,000/program/year

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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 curricula and 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.



**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.



**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.



**Teens and High School**

Provides details about key financial concepts, such as budgeting, credit, investing, liability, and the benefits of financial institutions.



**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.



**Adults**  
*Avail. in Spanish*

Provides adult learners with tools and strategies to enhance personal financial wellness and achieve greater stability.



**Economically Vulnerable 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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# 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
<b>ANNUAL PROFESSIONAL SERVICE COST</b>	<b>\$25,000</b>	<b>\$15,000</b>	<b>\$10,000</b>

## 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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# 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.



**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
<b>FB Online Access Incl. Annual Group Reporting*</b>	\$50/seat (+\$1,500 set-up fee)
<b>BEST VALUE Unique Company URL: Up to 250 seats</b>	\$10,000

### Courses Added Regularly!

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

- First Time Homebuying
- The Benefits Cliff
- Debt Collection
- ...And more!

\*Access to FB Online included at the Growth Partner level and above

### 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 current financial landscape.

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



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# THE FB DIFFERENCE

## TRANSFORMING FINANCIAL FEARS INTO FINANCIAL FREEDOM

Our financial education courses don't just teach — they transform. Learners walk in with questions and leave with confidence, clarity, and skills they can use immediately to build a better financial future.

### 2025 LEARNER PRE/POST SURVEY RESULTS

#### Financial Foundations (High School)

- Knowledge soared from 36% to 73%
- Confidence grew from 60% to 74%

*"Now I know how to make a budget and actually stick to it." – Student Participant*

#### SAFE: Strategies for Advancing Financial Empowerment (Adults)

- Knowledge jumped from 38% to 83%
- Confidence more than doubled — from 38% to 80%

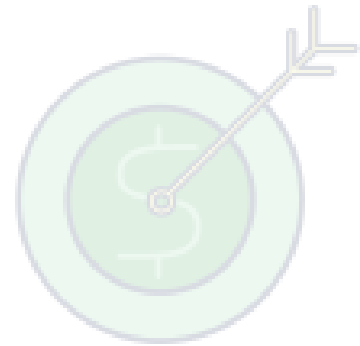
*"I used to avoid thinking about money. Now, I feel in control and optimistic about my future." – SAFE Participant*

#### BEFORE

"I don't know where to start."  
"Budgeting feels overwhelming."  
"I avoid looking at my credit score."

#### AFTER

"I feel in control of my finances."  
"I created a plan I can actually stick to."  
"I'm setting goals — and hitting them."



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**TEACHING PERSONAL FINANCE — BUILDING THRIVING FUTURES**  
**JOIN THE MOVEMENT!**

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