

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
- 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



800-406-1876 | info@financialbeginnings.org

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

SPONSORSHIP BENEFITS

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	✗
Basic Partnership: 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 \$50,000 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

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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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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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