



**topics education**  
strategies for education impact<sup>SM</sup>

## Issue: Financial Literacy

Unfortunately, the financial health of too many Americans suffers today, further exacerbated by poor financial habits and low levels of financial literacy. A better educated and more proactive population is key to addressing the crisis – both immediately and long term.

### Citigroup's Challenge

In order to confront the issue, Citigroup needed a widespread education outreach campaign focused around teaching the basic skills of personal finance, starting with students in K-12 classrooms. Senior citizens, the "unbanked" and recent immigrants also represented target audiences for Citigroup. And with a network of national nonprofit partners ready to reach these audiences, **Citi needed to build an engaging and impactful financial education program.**

### Topics Education's Solution

Within our network of experts we worked with Nancy Brown, a nationally respected financial education specialist, to design an extensive, multi-faceted program that would reach and educate each of the diverse audiences. We created 18 instructional units, comprehensive facilitator materials for teachers, and PowerPoint assessments. Additionally, we worked with Citi's IT team to transcreate the content for online delivery. In order for the program to meet the needs of a wide audience, we ensured that the resources addressed both the Jump\$tart Coalition standards on personal finance and the National Council on Economic Education (NCEE) standards on economic education, and we offered all components in both English and Spanish.

### Our Results

To date, Citigroup and its nonprofit partners continue to use the **financial education program to teach financial literacy around the world — training thousands to work in their communities using the curriculum and reaching hundreds of thousands of consumers of all ages.** That success has led to our creating Canadian versions (English and French Canadian) of the resources, developing tutorials for small businesses, and presentations for housing counselors, among other ongoing projects and initiatives for Citigroup companies.

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***"Topics Education brought together seamlessly the elements to make Citigroup's curriculum possible: expertise in research and development, creativity, organization, and execution."***

- Executive Director, Citigroup's Office of Financial Education



**Teaching the Basic Skills of Personal Finance to a Wide Audience**

**Training Thousands to Educate Others in Their Communities**

**Reaching Hundreds of Thousands of Consumers of all Ages**

