



## KEEPING YOUR MONEY SAFE WORKSHOP OVERVIEW

### **Workshop Description**

Navigating the U.S. financial system can be overwhelming. Here, participants and coaches will become more familiar with different financial institutions, learn the importance of them, and understand how they can use savings and checking accounts to manage their money more effectively.

### **Key Workshop Goals**

- Use banks and credit unions for more effective money management
- Understand the benefits of using a financial institution
- Understand account fees and other basics
- Learn about account holder responsibilities
- Learn the difference between a bank and a credit union

### **Core Skills Covered**

- Finding the right institution
- Choosing the right kind of account
- Identifying various fees
- Using accounts responsibly

### **Handouts To Be Given Out and Discussed**

- The Cost of Using a Financial Institution
- What do Financial Institutions Offer

**Coach and Participant Exercise:** What Do They Offer

**Follow-up Exercise:** Coach and participant do a personal cost-benefit analysis for using a financial institution.