

FINANCIAL LITERACY UPDATE

DR. CHAU DAO, TERRENCE PRATT & DIANA FELIX



Financial Literacy Plan-Fall 2014

Financial Literacy Event (Diana Felix & Terrence Pratt) - "Things I Wish I Would've Known: Budgeting & Credit Management" presentation, November 13th, 2014

Expected Attendance: 200-400 Mt. SAC students; ACES, Arise, Aspire, Bridge, Veteran students & Dream Believe Achieve (DBA) Club members.

Location: Design Technology Center

Funds Needed:

Food \$2,000 - attendees will have an opportunity to eat after the workshop and review marketing material that will be placed out in the lobby that informs them about financial literacy topics (such as posters with data stats outlining the debt interest increasing and budgeting tools they can utilize to apply the concepts taught in the presentation).

Marketing \$1,000- 10 infographic images that pertain to financial literacy to enlarge on display on an easel during the workshop and future financial literacy events.

Incentives \$1,000- Giveaways to attendees for the event:

1st place- iPad Mini (estimated value: \$299)

2nd place- \$200 gift card to Mt. SAC bookstore

3rd place- \$100 gift card to Mt. SAC bookstore

Five- \$20 gift cards to the Mt. SAC bookstore

Total Funds Requested for Fall 2014: \$4,000

Update on Financial Literacy Plan -Fall 2014

- Thursday, November 6, 2014 was the financial literacy event for all Mt. SAC students. We had a total of 300 students attend
- Surveys were gathered from 300 attendees and the data is being analyzed and the information will be utilized for the upcoming financial literacy event in spring 2015 (May 7th, 2015)
- The workshop was videotaped by media services and will be uploaded on the Financial Aid and ACES (TRIO) websites
- Financial Literacy Committee was formed from key personnel in Student Services
- \$2,866.17 was used for the fall 2014 financial literacy event
- Requesting to use the remaining \$1,133 left over to use for Diana Felix to attend the Annual Conference on Financial Education- "Financial Literacy 2.0- Ensuring Effective Outcomes"

FINANCIAL LITERACY UPDATE

DR. CHAU DAO, TERRENCE PRATT & DIANA FELIX



Financial Literacy Plan-Spring 2015

Financial Literacy Event - Loans, Credit Scores and your Future: Reality Check

Expected Attendance: 200-400 Mt. SAC students; ACES, Arise, Aspire, Bridge, Veteran students, Dream Believe Achieve (DBA) Club members and Fall 2015 transfer students.

Location: Design Technology Center

Funds Needed:

Food \$2,000 - attendees will have an opportunity to eat after the workshop and review marketing material that will be placed out in the lobby that informs them about financial literacy topics (such as posters with data stats outlining the debt interest increasing).

Marketing \$1,000- 10 info graphic images that pertain to financial literacy to enlarge to display on an easel during the workshop and future financial literacy events.

Incentives \$1,000- Giveaways to attendees for the event:

- 1st place- iPad Mini (estimated value: \$299)
- 2nd place- \$200 gift card to Mt. SAC bookstore
- 3rd place- \$100 gift card to Mt. SAC bookstore
- Five- \$20 gift cards to the Mt. SAC bookstore

Total Funds Requested for Spring 2015: \$4,000