

American Financial Services Association Education Foundation
MoneySKILL Ambassador Program
Description of Role

The mission of the American Financial Services Association Education Foundation (AFSAEF) is to educate consumers of all ages on personal finance concepts, help them realize the benefits of responsible money management, and understand the credit process. To help achieve this mission, and with the generous support of AFSA members, the foundation developed a free, online personal finance course — MoneySKILL®. The 37-module program educates learners of all ages on the basics of money management. The AFSAEF would like to continue to expand the reach of MoneySKILL content beyond the classroom and get it into the hands of all consumers. That’s where you come in — as a MoneySKILL Ambassador.

Who are MoneySKILL Ambassadors?

MoneySKILL Ambassadors are highly motivated volunteers in various financial services occupations who have ready access to the adult consumer. They are passionate about financial education and believe in the rich content MoneySKILL has to offer. Additionally, these individuals have opportunities to interact with adults in a variety of settings — work, the local community center, neighborhood forums, nonprofit organizations, civic organizations, parent teacher associations — and can become trusted voices in their community. Regardless of the setting, ambassadors are advocates for the importance of financial literacy for all ages and have a desire to help others improve their financial well-being.

What is expected of a MoneySKILL Ambassador?

- Identify groups in your community that may be under financial stress (i.e. living “paycheck to paycheck”).
- Find ways to share your own financial expertise and guidance with these groups through education, best practices, and key money management tips.
- Promote the use of the MoneySKILL program for students, employees, and customers. This includes reaching out to local schools that do not currently use MoneySKILL.
- Hold or participate in one or more community activities — a town hall, a roundtable, a community fair, or a one-on-one visit — to share knowledge and disseminate collateral material.
- Download and share supporting material and collateral from our ambassador toolkit.
 - Place informational collateral around your office and at community centers, community meetings, PTA meetings, neighborhood associations, and other locations where adults gather.
 - Point individuals looking for additional support to foundation’s consumer landing page at www.afsaef.org/MoneySKILL/Myth-Breakers.

- Tell the story within your company fostering financial support for MoneySKILL and gaining buy-in for internal financial education offerings such as a joint landing page between your company and the AFSAEF.
- Report back to the AFSAEF with learned insights on community and individual pain points to ensure the relevancy of supporting content and material.
- Share updates on outreach via our online reporting tool.

What are the qualifications of a MoneySKILL Ambassador?

- Must be an AFSA member.
- Understanding of budgeting, saving and investing, credit management, insurance, and retirement topics.
- Passion for financial literacy and supporting your community.
- Ability to work independently.
- Commitment to contributing time and energy outside of regular office hours.

What are the benefits of being a MoneySKILL Ambassador?

- Satisfaction in helping members of your community become more financially fit.
- Access to an informative toolkit that you and your community will find beneficial.
- Recognition within your company for serving as a MoneySKILL Ambassador.
- Recognition from the AFSAEF in the form of a certificate.
- Recognition in AFSA Newsbriefs and the AFSAEF quarterly newsletter, *MoneySKILL Matters!*

THE MONEYSKILL® MODULES AND THE MATERIAL AND COLLATERAL FROM THE MONEYSKILL® AMBASSADOR TOOLKIT ARE PROVIDED BY THE AFSA EDUCATIONAL FOUNDATION FOR INFORMATIONAL AND EDUCATIONAL PURPOSES AND ARE NOT INTENDED AS FINANCIAL OR LEGAL ADVICE. INDIVIDUAL FINANCIAL SITUATIONS MAY VARY.