

TALKING ABOUT FINANCIAL LITERACY

WHAT IS DOLLARS & SENSE?

“Dollars & Sense” is the cornerstone of CalCPAs’ and CalCPA Institute’s financial literacy initiative. Dollars & Sense workshops are offered as a public service to help Californians “get the most for their money.”

WHO ARE DOLLARS & SENSE WORKSHOPS FOR?

They are designed for any Californian interested in improving their financial literacy

WHO HOSTS DOLLARS & SENSE WORKSHOPS?

They are designed to be jointly hosted by CalCPA and another entity (i.e., community group, state legislator, PTA, nonprofit, etc.).

WHAT PART DOES CalCPA PLAY?

CalCPA provides 3-4 CPA volunteers to lead the workshop—a 45-60 minute presentation on financial topics such as budgeting, money management, managing credit cards, saving and investing, tax tips, disaster preparedness, financial preparations and more. The presentation is followed by an hour of Q&A with the audience. We also include user-friendly take-home materials for audience participants.

WHAT ARE THE HOST RESPONSIBILITIES?

The host arranges for a location, sends invitations and/or announcements, handles earned media and staffs the event.

CAN THE PROGRAMS BE CUSTOMIZED?

Yes, Dollars & Sense can be customized for practically any audience. In addition to general financial planning and tax-related topics, we can tailor programs for:

- College students
- Entering the job market
- Parents
- The “sandwich generation”
- Change in marital status
- Life crisis
- Small businesses/entrepreneurs
- Military families/reservists
- Retirement
- Home owners
- General adult audience

WHAT ABOUT PR FOR THE EVENT?

To help hosts prepare for a Dollars & Sense workshop, CalCPA will provide sample fliers, press releases, news advisories, etc. In some instances, CalCPA may lead the media outreach effort.

WHAT ABOUT HIGH SCHOOL STUDENTS?

While CalCPA has an excellent Dollars & Sense module for high school students, most high school presentations need to be more interactive. Thus, CalCPA members have been working with curriculum developed by the National Endowment for Financial Education (NEFE) when they visit high school classrooms.

WHAT ARE THE NEFE MATERIALS?

NEFE provides a comprehensive curriculum guide, and both our volunteer and the teacher get a copy. Additionally, each student receives a workbook. The modules in the NEFE program include budgeting, saving and investing, and credit.

HOW ARE HIGH SCHOOL VISITS SCHEDULED?

David Lo, CalCPA Institute strategic relations manager, (818) 546-3559 or david.lo@calcpa.org schedules high school visits and is the liaison for volunteers and teachers.

HOW ARE ALL OTHER VISITS SCHEDULED?

To schedule a Dollars & Sense workshop or obtain additional information or materials, contact David Lo, CalCPA Institute strategic relations manager, (818) 546-3559 or outreach@calcpa.org. 📞

