Utah Banker’s Association

Financial Literacy Committee

4/9/19

Attendees:

Meeting Minutes

Reporting GSAC and TCTS to [Lindsay@uba.org](mailto:Lindsay@uba.org)

* Report back to Lindsay the number of students, classes and bankers involved for the 2018-2019 school year. Reporting is not limited to Title 1 schools or children, may be adults and non-Title 1 schools.
* Materials to use for grade school children will be posted on UBA collaborate site.

Teach Children to Save Day Governor’s Declaration

* Governor signed the declaration
* This may be used to help set up teaching appointments

Ideas for Safe Banking for Seniors Training

* Opportunity to partner with Adult Services, who presents with the Bank as a host for the webinar or event.
  + Notices about the event may be provided online and in branches.
  + In order to get CRA credit, must obtain address of attendees to identify census tracks. Even if you serve a broader audience, you can obtain CRA credit if you are serving LMI populations.
  + One webinar will be hosted by UBA with the help of Don and Seth as an example and trial; then each Bank can follow suit (either host their own event or use the recording the from the UBA’s event).
* Targeted presentations for frontline staff
  + AARP is a good resource for this type of training
  + Report to adult protective services and FinCEN (SARs)
* Targeted presentations for seniors
  + Red flags to watch out for, training and instructions on how to set up appropriate authority and access over accounts and finances.

CRA Tools – Paul Irwin

* Nces.ed.gov
  + In order to identify Title 1 schools on this site, export to Excel and filter by Title 1 schools.

Next Year’s Chair and Schedule

* Colby will be the chair beginning in August; Paul is the vice chair.
* Let them know if you have ideas or suggestions about the agenda items, initiatives, and/or projects for the committee.