

2021 Native Financial Education Practitioners Summit

Resource List

Sequoyah Fund YouTube- https://www.youtube.com/channel/UCQad4j3E-4pBT_OphZQAdeA

Teaching Platform- Thinkific- <https://www.thinkific.com/>

Setmore for Scheduling- <https://www.setmore.com/>

Stream Yard- <https://streamyard.com/>

FINRA Report- https://www.usfinancialcapability.org/downloads/NFCS_2015_Report_Natl_Findings.pdf

Stock Splits- <https://www.schwab.com/fractional-shares-stock-slices>

Credit Builders Alliance- <https://creditbuildersalliance.org/>

Oweesta Financial Education Report- <https://www.oweesta.org/wp-content/uploads/2019/10/Oweesta-Key-Bank-Report-2019-Digital-Edition.pdf>

Free Tax Return Preparation for Qualifying Taxpayers <https://www.irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers>

ONABEN- <https://onaben.org/>

Native Women Lead- <https://www.nativewomenlead.org/>

First Peoples Fund- <https://www.firstpeoplesfund.org/> - First Peoples Fund- NAPD Training (Native Artist Professional Development Training)At the training, we will work with you to help you grow your arts business. Our two-day workshops give artists real-world tools and detailed resources to navigate the arts industry and become successful entrepreneurs. <https://www.firstpeoplesfund.org/napd-registration>

Freddie Mac HomebuyerU- <https://sf.freddiemac.com/working-with-us/creditsmart/courses>

Diversified Resource Network- <https://diversifiedresourcenetwork.org/>

Free Annual Credit Report- <https://www.annualcreditreport.com/index.action>

Fair Credit Reporting Act- <https://www.ftc.gov/enforcement/statutes/fair-credit-reporting-act>

CBA Products Toolkit- <https://cbatraininginstitute.org/products-in-box-initiative-toolkits/>

FINRA Broker Check- <https://brokercheck.finra.org/>

Housing Professionals Resource Center subscription center link:
<https://sf.freddiemac.com/about/single-family/subscription-center>

Natives on a Budget Podcast- <https://nativesonabudget.com/>

Ask Dr. Percap Articles- Shawn Spruce agoyopi@gmail.com

Recommended Microphone- <https://amzn.to/3xzpdWS>

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Day 1: Best Practices in Program Design

Email, Phone to keep in contact with clients

Strategic Planning on Better Communication: Inventory on home and preferred learning methods

Online Learning Platforms

Implementing different apps such as Mint

BNC Classes on Zoom in 3 Sessions: Spending and Budget, Process of Homebuying, One-on-One One Month Budget to Actual Analysis

NACA TA Grant and ROSS Grant for Program Funding

Work with local financial institution staff to guest present information. Get them involved. Bank/credit unions are great sources of funding for financial education in rural areas.

COVID OPPORTUNITY: Stimulus checks created an incentive to file 1040, bringing more dollars back into native communities.

Give participants gift cards for participating. We give \$20 grocery/gas card after first class and \$60 gift card after last class (class 6).

Day 2: Marketing

Mass Texting through Texting Apps

Snail Mail

Texting to receive payments and take orders- addressing lack of internet

Leaning on to physical marketing: flyers, mail, billboards, posters

Providing one-on-one financial education in pieces

Facebook, Zoom, YouTube, Website

Online newsletters printed and mailed for ease of access

Etsy to Sell Products

Creating a brand kit for social media to address turnover

Challenges with Branding for Entrepreneurs and General Marketing

Reaching out to partners and being able to have them share what they are doing

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Day 3: Wellness

Setting Boundaries, including personal social media and clients- redirect to office hours or office social media

Creating a Separation between Work Station and Rest of Home

Physically separate through a workout or shower after work to clear the energy from work (or same before going to work)

Coaching Tips: Taking time to apply those concepts

Book suggestion: "Power of a Positive No" As Ury writes, the Positive No is a marriage of two of the most fundamental words in the language: Yes and No. Yes is the key word of community; No the key word of individuality Yes is the key word of connection; No the key word of protection Yes is the key word of peace; No the keyword of justice

Day 4: Resources

Family Feud Template- https://docs.google.com/presentation/d/1arPI55wKRqLo-z3sGdKw66xY2WsQr4_7VokAr3UZ3nY/edit#slide=id.p14

Slack- <https://slack.com/>

Diversified Resource Network- <https://diversifiedresourcenetwork.org/>

Funding Opportunities- local banks contributions, grants, Insurance contributions (AMERIND) Local tribes...donate space when we are working in their villages

Jeopardy Labs- <https://jeopardylabs.com/>

Slido- <https://www.sli.do/>

Jamboard- <https://jamboard.google.com/>

Financial Social Work Curriculum- <https://financialsocialwork.com/>

Bingo Card Developer- <https://myfreebingocards.com/bingo-card-generator>

Consumer Financial Protection Bureau- <https://www.consumerfinance.gov/>

Shawn Spruce agoyopi@gmail.com

Reach out to different organizations to support your raffles, prizes, etc. to assist in financial events

iSpring- <https://www.ispringsolutions.com/>

FDIC- <https://www.fdic.gov/>

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HUD ROSS Grant-

https://www.hud.gov/program_offices/public_indian_housing/programs/ph/ross/about

HomeWise- forgivable loan program and DPA in NM <https://www.homewisedocs.com/>

Youtube- <https://www.youtube.com/>

VITA- <https://www.irs.gov/individuals/irs-vita-grant-program>

Small Business Association- <https://www.sba.gov/>

Wheel of Names- <https://wheelofnames.com/>