



NASAA's *IEC* Newsletter

FEBRUARY 2017 EDITION FEATURING:

- *Budgeting and Personal Finance*
- *For Love or Money*
- *Inspiring Outsider*
- *NASAA Social Media CenterRer*



"Money can buy you a fine dog, but only love can make him wag his tail." –"Kinky" Friedman

February is Responsible Pet Owners month, and being a good pet parent can get expensive! Pets are a great conversation starter when it comes to teaching children about budgeting. That's because other than the availability of pet insurance, most pet care costs are out of pocket.

Many personal finance educators are familiar with the “Game of Life” program of educating young people. It involves having students choose between a number of career options, which starts them off with an annual income, tax rate, debt and savings. From there, students have to figure out how to budget for housing, utilities, and more! It can get complex, but you can simplify this game by having students select a fictional pet! Engage them in financial decision making through shopping for all the supplies and services their pet requires. Throw some curve balls their way by suggesting that their pet needs a visit to the vet, or that a favorite toy is lost and needs to be replaced.

For a full Game of Life simulation, U.S. IECs can check with the [Council for Economic Education](#) Local offices are wonderful partners to securities administrators, and they may be willing to provide you with some free materials or even join you as a co-presenter. And for more fun ways you can teach children about money using pets, check out these incredible ideas from [Money](#)

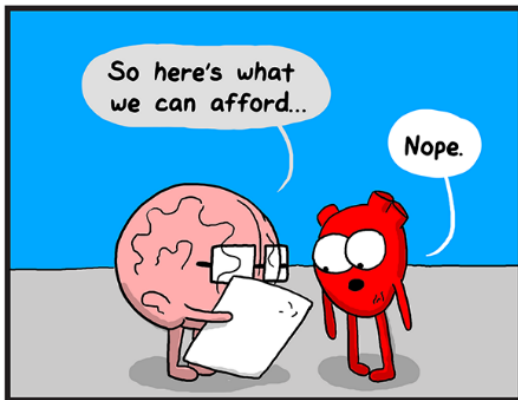


For Love or Money?

Time to dust off a classic. MASH! Sure, it's a silly game many women remember playing as children. Will you live in a Mansion, Apartment, Shack or House? Who will you marry? What

about kids, jobs and cars? MASH can serve as a fun icebreaker, especially if you're talking to an audience of mostly women in their 30s-40s. It makes for a fun way to start a conversation about planning for their financial futures. For those of you who are new to MASH or have simply forgotten how to play, here's a [tutorial](#).

Now that you've got your audience's attention, talk to them about the very real struggles many couples have when it comes to managing money. Kansas State researcher [Sonya Britt](#) found that couples who argued about money early in their relationships – regardless their income, debt or net worth – were at a greater risk for divorce. Financial stress in a relationship can be devastating. Couples fear these consequences. That's where you come in. Create a program for newlyweds! Talk to them about budgeting, paying off debt, saving, and investing for the future.



Inspiring Outsider

Ever heard of the comic strip [The Awkward Yeti](#)? The artist does a great job of illustrating all sorts of battles between the Brain and the Heart, including financial struggles we all face. The [small snippet](#) above ends with Heart setting fire to the budget, despite firm assertions by Brain that there is no money left to spend. Comics and memes are great for literally illustrating ideas. Our brains process these kinds of visuals much faster than written text or even

the spoken language. Try incorporating some fun imagery into your presentations, social media posts, and website content. Follow [The Awkward Yeti](#) on Twitter.

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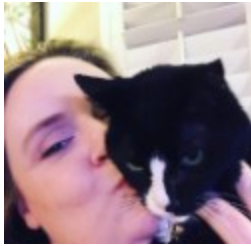


If you would like to curate a **so.me**.list, please email marissa.sollows@fcnb.ca. **so.me.** is maintained by the online outreach and social media project group. For past editions of **so.me.** visit the [NASAA Social Media Center](#). If you don't have access to NASAA member's only, please contact Bob Webster at bw@nasaa.org.

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Notable NASAA Member:

Follow the Investor Office of the Ontario Securities Commission on [Twitter](#)!



TODAY'S so.me. CURATOR

Kelly Griese

*NASAA Online Outreach and Social Media Project Group
Investor Education Coordinator, Indiana Securities
Division, Indiana Secretary of State*

When Kelly isn't cuddling with her adorable and super fashionable cat, Frankie, or volunteering at the Indianapolis Zoo or Brooke's Place for grieving children, or exploring new places to eat in the Circle City... she's busy talking with people of all ages about how to improve their financial situation and avoid investment fraud. She's addicted to memes and cat videos and has used both to make her IEC presentations more entertaining and informative. Contact Kelly: kgriese@sos.in.gov.

NASAA SOCIAL MEDIA CENTER

The Social Media Center is accessible to members only. You can find it under the Investor Education section of the NASAA website. It includes a lot of helpful information for making the most of your online outreach. It also includes social media sample posts that you are welcome to use – like this one: Happy #ILoveToReadMonth! Books are a fun way to teach children about money. Here's our favorite: <http://bit.ly/UsedToBeRich>



NASAA's *IEC* Newsletter

MARCH 2017 EDITION FEATURING:

- *Did you use St. Patrick's Day to promote your IE activities?*

- *Why You Need a Social Media Strategy*
- *Don't Buy Stuff You Can't Afford!*
- *NASAA Social Media Center*



Did you use St. Patrick's Day to promote your IE activities?

I can relate to this guy. Although my heritage is half-Irish, when my older brother and I were in grade school we refused to wear green on St. Patrick's Day, much to the dismay of our 100-percent Irish mother. We preferred to don clothes that we thought back then was representative of our Dad's 100-percent Italian heritage. Let's just say Mom made it known she wasn't happy with our decision. Kids can be so cruel sometimes.

Something all of us IE pros can do is use various "celebrations" each month to connect with our efforts to educate the public. For example, National Consumer Protection Week was the first week of March, April is Financial Literacy Month, and of course there's always April 15th, or Tax Day, in the U.S.

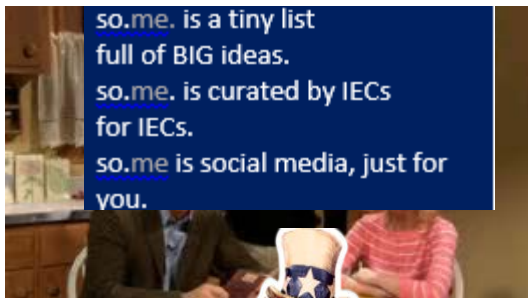
Providing financial-related consumer information to the citizens of your state or province during these celebratory weeks and months are a quick way to connect with your ongoing public awareness activities.

Look for national non-profit organizations that are often behind the activity and you're likely to find lots of free, usable content on their websites that you can use, such as template news

If you need more inspiration, [check out this list of unique](#), odd and (somewhat) unknown holidays and observances in April.



[Here's an interesting column from Neil Patel](#), contributing writer at Forbes magazine, about why your social media strategy *isn't* working. Although the column is geared toward businesses, the examples he uses of what you should do are also beneficial for ensuring success in your state organization.



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Notable NASAA Member:

See how the [Kansas Office of the Securities Commissioner](#) uses social media to connect with their stakeholders.

or [Mindset Digital](#). They stress that in today's fast-moving world, the attention span for most people is only **8 seconds**! To engage your audience, content must be highly visual, high energy, informative/educational and FUN!

TODAY'S so.me. CURATOR
Dan Orzano

*NASAA Online Outreach and Social Media Project Group
Educational Outreach Manager, Ohio Division of Securities*

Outside of the office, Dan enjoys almost anything automotive including going to car shows, racing events and his annual trek to the North American Saab Owners Convention. He likes to attend Columbus-area arts and cultural activities, try new restaurants and explore all that central Ohio has to offer. Whenever time and money allow, he strives to get beyond the I-270 Outerbelt and travel the U.S. and overseas. His favorite destinations so far include Seattle and Stockholm, but other parts of the U.S. and Europe are on his travel bucket list. Additionally, Dan “pays it forward” by mentoring hundreds of college students who sought careers in public relations and communications. In 2004 he was named National Professional Advisor of the Year by the Public Relations Society of America.

Contact Dan: Daniel.Orzano@com.state.oh.us



NASAA SOCIAL MEDIA CENTER

Need more guidance? Check out the NASAA member's only Investor Education section and visit the Social Media Center. Whether you're a social media pro or newbie, it's a good idea to review the [“Do's and Don'ts of Social Media”](#) section.



NASAA's *IEC* Newsletter

APRIL 2017 EDITION FEATURING:

- *Uniting around Financial Capability Month*
- *Talk With Our Kids About Money Day*
- *Inspiring Outsider*
- *NASAA Social Media Center*



Uniting around Financial Capability Month

The United States celebrates Financial Capability Month in April and it is a good opportunity to talk about the basics of saving and investing to a broad audience. Here are a couple of ways to get started:

- **Proclamation:** To make it official, you can submit a proclamation to your Governor's office to recognize the importance of Financial Capability to everyone at every stage of life.
 - **News Release:** Send out a news release highlighting financial education activities that are occurring in the month of April to celebrate Financial Capability Month. Hint: they can be regularly occurring activities that you do every month!
 - **Repurpose content:** The [NASAA Investor Education website](#) has a wealth of resources to share on social media. You could also utilize information on your website and "celebrate" it as part of Financial Capability Month.
 - **Social Media:** Sharing tips and infographics to promote financial education is an easy way to fill up your social media calendar for the month of April.
 - **Collaborating with like-minded organizations:** Financial Capability cuts across sectors, age groups, and issue areas. Identify state agencies that have a stake in financial education and empowerment on events and social media. Reach out to stakeholders like non-profits, financial institutions, and consumer advocacy groups to further maximize your reach.
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Talk With Our Kids About Money Day

"Talk With Our Kids About Money Day" is April 19th in Canada. The goal of the awareness day is to focus on talking about money with youth and to encourage and support parents, guardians and teachers to start or continue such talks.

If your looking for a great resource to use when talking to kids about money, check out the [Make it Count](#) education program from the Financial and Consumer Services Commission of New Brunswick, Canada.

Share, Save, Spend is a fun, educational activity to use with all ages. All you need is a pen and paper. Fold a piece of paper into three sections and ask the participants to group income into groups – how would they prioritize spending money, ideas to share it, and what to save for in the future.

This is a particularly useful tool to use with school-age children after reading a children's book on the topic of financial literacy. ([Alexander Who Used to Be Rich Last Sunday](#) is NASAA President Mike Rothman's book of choice for elementary school visits.)

For more information on the topic of using children's books to talk about money, [the University of Minnesota Extension](#) is a great resource.

The concept of Share, Save Spend isn't limited to younger audiences, adults can benefit from the concept to think broadly about saving and investing.



Inspiring Outsider

At the Investor Education Conference, the British Columbia Securities Commission debuted their most recent video featuring the Fraudster Crooner:

Check out this creative video to spread the message of fraud prevention:

<https://www.investright.org/resources/video/>.

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Julia Miller

*NASAA Online Outreach and Social Media
Project Group
Deputy Communications
Director, Minnesota Department of
Commerce*

As a “Jane” of all trades, master of none,
Julia does everything from social media,
copy writing, content marketing, media



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Notable NASAA Member:

Follow the Financial and Consumer Services Commission of New Brunswick on [Twitter](#) and [Facebook](#).

relations, event planning, speech writing, and financial literacy outreach.

Contact Julia:

julia.miller@state.mn.us



NASAA SOCIAL MEDIA CENTER

Did you attend the Investor Education Conference in Columbus, OH last month and want to do more with social media?

The NASAA Member's Only Investor Education section [Social Media Center](#) has tailored resources to help you use social media and learn best practices:

- [The Social Media Handbook \(2014 update\)](#)
- [NASAA Social Media User Guide – Twitter Engagement](#)
- [NASAA Social Media User Guide – How to Create a Facebook Page](#)
- [NASAA Social Media User Guide – Facebook Advertising](#)
- [NASAA Social Media User Guide – Do's and Dont's](#)
- [Guide to NASAA Member Jurisdiction's Social Media](#)
- [so.me. Your social media newsletter](#)
- [Social Media 2016 Calendar](#)

Still have questions? Feel free to contact one of the members of the Online Outreach and Social Media Project

Group:

Marissa Sollows	(New Brunswick),	Chair
Kelly Gries		(Indiana)
Kevan Hannah		(Ontario)
Caley Love		(Kansas)
Julia Miller		(Minnesota)
Dan Orzano	(Ohio)	



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NASAA's *IEC* Newsletter

MAY 2017 EDITION FEATURING:

- *Older Americans Month: Age Out Loud*
- *Senior Financial Fraud*
- *Multicultural Outsider*
- *NASAA Social Media Center*



Older Americans Month: Age Out Loud

May is [Older Americans Month](#) in the United States. Across America, the Administration for Community Living will lead awareness efforts focused around this year's 2017 theme *Age Out Loud*. This year's theme is a reflection of modern day aging in today's older adult populations.

As you conduct outreach efforts in your jurisdiction during Older Americans Month around the theme *Age Out Loud*, make sure to use the following hashtags:

- o #OAM17
- o #AgeOutLoud

To learn more about the history of Older Americans Month, be sure to check out the U.S. Department of Health and Human Services [Administration for Community Living](#).

For more senior-related outreach materials, check out NASAA's [Serve Our Seniors](#) website and the Securities and Exchange Commission's [Senior Resources](#).



Senior Financial Fraud

Senior financial fraud is a significant issue facing elder populations today as poignantly discussed in this [New York Times](#) article. A recent [study](#) conducted by the [U.S. Senate Special Committee on Aging](#) identified the top 10 scams targeting seniors in America:

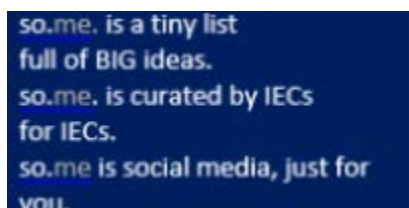
- IRS Impersonation Scams
- Sweepstakes Scams
- Robocalls/Unwanted Phone Calls
- Computer Scams
- Elder Financial Abuse
- Grandparent Scams
- Romance Scams/Confidence Fraud
- Government Grant Scams

- Counterfeit Check Scams
- Identity Theft

NASAA is continuing to combat senior financial fraud with its [SeniorSafe Training Program](#). This year NASAA designated June 11-17, 2017 as its second “SeniorSafe Training Week.” During the week various member jurisdictions will be holding SeniorSafe trainings. As a reminder, if your jurisdiction plans to participate in SeniorSafe Training Week, please contact Bob Webster at bw@nasaa.org.

Multicultural Outsider

As investor education outreach professionals, it is crucial to reach diverse audiences. Many jurisdictions, including the [Ontario Securities Commission](#), offer multilingual investor education outreach resources.



TODAY'S so.me. CURATOR

Micaela Coleman

*Assistant Manager of
Communications and Investor
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Notable NASAA Member:

Follow the Oklahoma Securities Commission Financial on [Twitter](#) and [Facebook](#).

A true modern woman, Micaela conducts outreach and communications efforts for NASAA. On the weekend, you can find her mentoring young professionals, volunteering with youth and speaking at public events on how to curate one's own personal brand throughout the greater Washington, D.C. area.

Contact Micaela: mac@nasaa.org



NASAA SOCIAL MEDIA CENTER

Make sure to check out the NASAA Member's Only Investor Education section and visit the [IE Toolkit Resource Guide](#). The guide provides a list of toolkits that have been developed by project groups within NASAA's Investor Education Section. These resources help IECs prepare and deliver targeted and effective investor education outreach programs in their jurisdictions.



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