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CEE Summer Institute

Introduction to Intuit Financial Education tools

7/14/22

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Intuit's mission is to
power prosperity
around the world.

We've seen firsthand the importance of developing personal finance and durable skills as individuals enter the job market.

We call this **job readiness**.



Goals of this financial literacy session

- **Learn** the basics of **financial literacy foundations**
- **Build Confidence** and knowledge with **Mint**
- **Test** your tax acument with **TurboTax**

Teaching **personal finance** just got easier

Our new finance curriculum helps students get introduced to the foundations of personal finance. Before being able to successfully bring financial topics to life in their own lives, they need to be able to understand basic financial topics like credit scores and debt.

We know that personal finance is not a requirement for most schools, so trying to find time to integrate it into your curriculum can be difficult. We created a course that is meant to be either teacher or student-led, asynchronous in the classroom or at home, and is mobile-friendly first.

Financial Literacy Foundations

This course is a free, mobile-friendly tool for students looking to enhance their financial literacy skills. The learning playlists can be taught in class or at home at a student's own pace, consisting of 7 playlists covering topics such as budgeting, credit cards, savings, and more. The course will help you support your students' knowledge gain and planned behavior for their futures.

What is Intuit Financial Literacy Foundation?

Intuit Financial Literacy Foundations is a digital financial education program designed to help you better manage your money. Get started today and take the first step in preparing for your financial future.

PROGRAM HIGHLIGHTS INCLUDE:

- A series of interactive modules on key
- Financial topics
- Mobile and tablet enabled so you can learn anytime, anywhere.
- Courses available in both English and Spanish

PLAYLISTS INCLUDE: Healthy Financial Habits, Savings, Credit Scores & Reports, Building Emergency Savings, Checking Accounts, Mobile & Online Banking, Identity Protection, Considering Homeownership, Paying for College, Budgeting Tool

Select a playlist

The topics below will help you explore and learn critical personal finance topics. Be sure to start with Financial Basics and finish with Small Business Startup Success. Each playlist consists of lessons that dive deeper into specific topics.

Financial Basics Understanding the basics of key financial concepts Explore	Building Financial Capability Learn how to apply your knowledge to help build critical financial skills and habits Explore
Building Financial Resilience Financial hardships can be scary, learn how to plan and prepare to overcome financial crisis Explore	College Financials How to plan and prepare your finances before and during college to help make it through to graduation Explore

How do I open a checking account?

Opening a checking account can usually be done in person or online, and it's usually as easy as completing three simple steps.

Select a number to learn more.

✓ Gather necessary documents.

In order to get started, you'll generally need the following:

A form of government-issued photo ID, such as:

- driver's license
- passport
- military ID

and

Any of the following:

Intuit Financial Literacy Foundation Demo

Intuit Personal Finance Capstone Resources

Using real-world tools

What is Mint?



Help students take control of their finances and their futures. Get students up to speed with budgeting, credit scores, savings, and more using **Mint**.

- **All your money in one app:** See where all your money goes by easily adding your cash, credit cards, investments, and bills.
- **Spend smarter and save more:** Personalized Mintsights™ make your money go further. Mint will automatically find savings you missed.
- **Stay focused on your financial goals:** Improve your spending habits with custom goals that keep you going. Save for a home, crush debt, and prepare for the future.

Business Insiders #1 budgeting app 2018, 2019, 2020



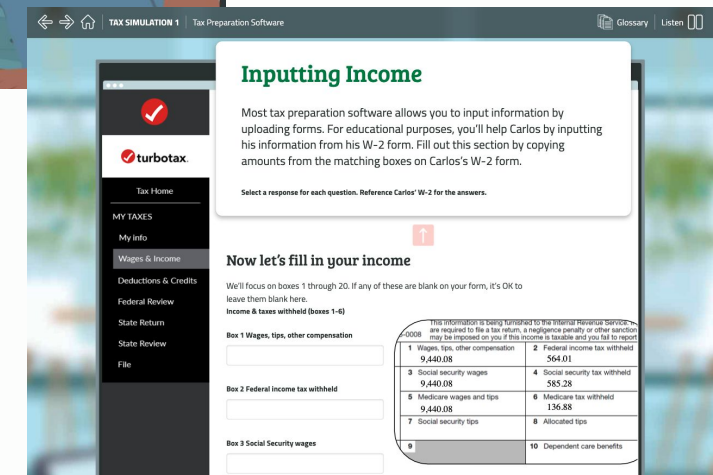
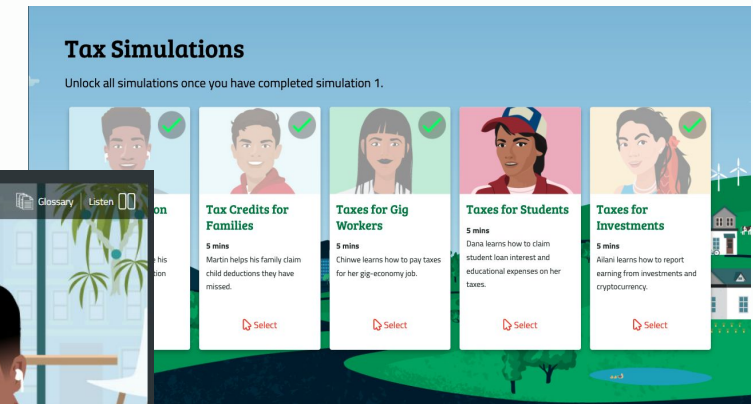
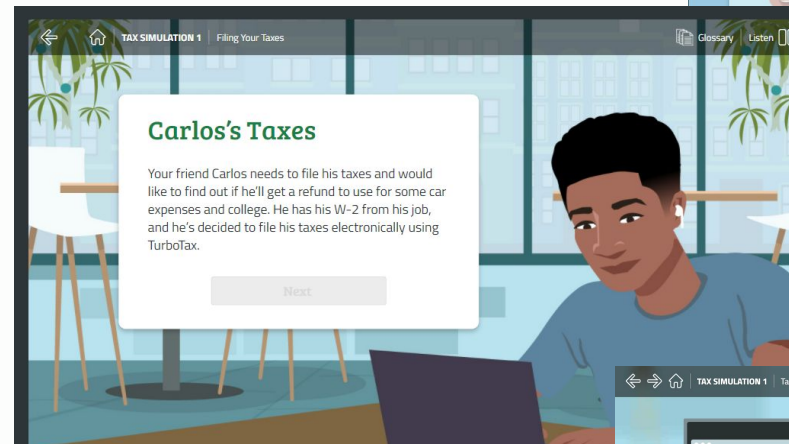
What is the TurboTax simulation?

A new simulation for 2022



Practice filing fictional taxes, in **easy** and **relevant** ways to **Demystify** Tax Day Anxiety, forever!

- **Tax Basics** curriculum
- **Fictional** W2 Scenario
 - Carlos
- **Relevant** Topics
 - Gig-economy
 - Education Credits
 - Cryptocurrency & Investments
 - Earned Income Tax Credit
- **Federal** and **State** Returns

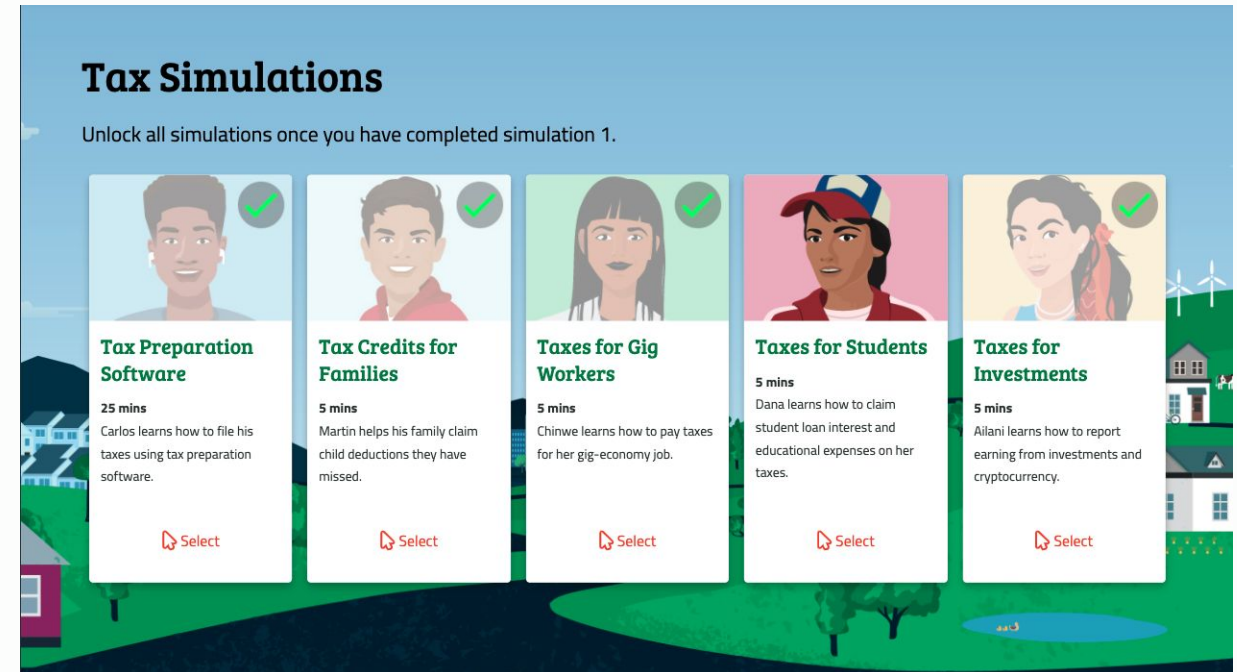


Simulation features



60 minutes of interactive learning.

- Easy for in-person or **asynchronous learning**
- **5 Scenarios**
 - Carlos is 25 minutes
 - Others last 5-10 minutes each
- Teacher **Resources**
 - Curriculum Guide
 - Discussion Guide
 - Glossary
 - Simulation Outline
- **Free** for teachers and students



TurboTax for the Classroom

Demo and breakout rooms

<http://turbotax.everfi.com/>

Q&A | THANK YOU!

Be on the lookout this year for:

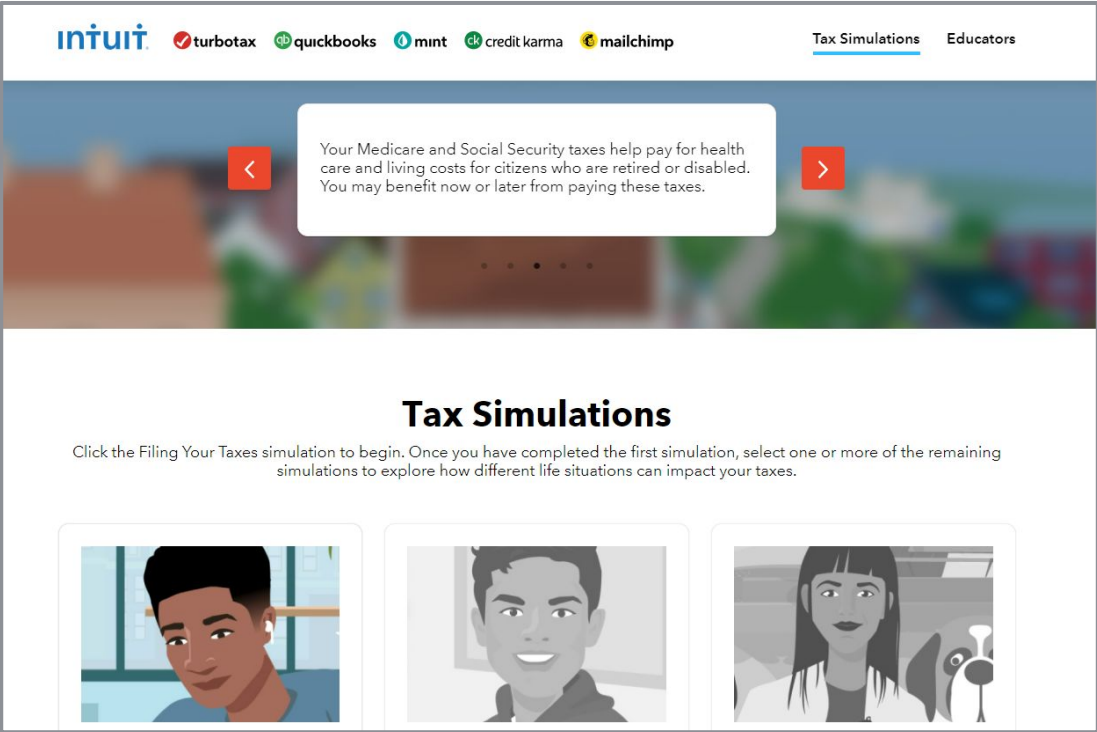
1. Updated Mint & TurboTax Curriculum
2. Library of Kahoot games
3. edX course on QuickBooks Education

For more information or support reach out to Education@intuit.com

Resources

Mint	TurboTax
<p>Part 1: Curriculum Overview (PDF) (Google Doc)</p> <p>Part 2: Curriculum Orientation (PDF) (Google Doc)</p> <p>Part 3: Student Activities (PDF) (Google Doc)</p> <p>Part 4: Assessments (Savings Accounts) (Budgeting)</p> <p>(Credit Cards) (Credit Report)</p>	<p>Part 1: Microsite to receive the simulation - (Sign Up)</p>

How to access the simulation



turbotax.everfi.com/



[product demo](#)

Teacher resources (links below)

[Product teaser](#)

[Product demo video](#)

[Educator resources](#) (accessible at turbotax.everfi.com)

[One page flyer](#)

Please fill out survey!

Breakout room discussion

Choose a topic within the Playlist you are assigned

Financial Basics	Breakout Room 1
Building Financial Capability	Breakout Room 2
Building Financial Resilience	Breakout Room 3
College Financials	Breakout Room 4
Adulting	Breakout Room 5
Small Business Startup Success	Breakout Room 6
Preparing for Retirement	Breakout Room 7

- A. What is the goal of this topic, as outlined on the first page of the topic?
- B. How is the information presented throughout the pages in this topic? *Describe layout, readability, any interactive elements, etc.*
- C. Is the site user-friendly for students? (navigation, etc.)
- D. Is the material age appropriate for high school students?
- E. How could you use this for in-person teaching?