

# invest it ▶▶ FORWARD

Connecting  
educators & classrooms  
with financial industry  
professionals & firms



“Programs like the Stock Market Game™ instill good habits that last a lifetime.”

— SIFMA Member Firm Volunteer



## FOUNDATION

## VOLUNTEER & FIRM ACTIVITIES

Are you a financial industry professional or a financial services firm wanting to volunteer? SIFMA Foundation offers simple ways to invest your talent and skills-based expertise to make a difference in your community.

### IN PERSON:

**Guest Speaker** Make a financial education related presentation to a classroom, afterschool program (in person, with a buddy or as a team). Average duration 2 - 4 hours. We provide the material!

**Field Trip Host** Invite our schools and classrooms to your office and introduce them to the inside world of a financial firm. Average duration 1.5 - 4 hours. A perfect fit for community days or team building.

**Recruiter** Encourage a school to register for The Stock Market Game™ program or a colleague to join you in volunteering. Anytime, anywhere.

### VIRTUAL:

**EMentor** Answer students' questions on portfolios, the market or the broader economy directly online in our portal. Average duration 1 hour.

**InvestWrite Judge** Judge essays in our nationwide essay competition, occurring twice per year. Average duration 1-3 hours depending on the grade level of essays assigned.

**Remote Guest Speaker** Same great experience and material as in-person speaking, but via skype, google chat or a firm hosted webinar. Average duration 1 hour.

**Video Volunteer** Record a quick clip video (2 min) on your phone or device, answering students' most frequently asked investing questions, exposing students to a financial professional regardless of location or technology.

## CLASSROOM MATERIALS

Need a presentation to use in a classroom, afterschool program, or youth group? Here are some materials that might help.

### Invest It Forward™ FINRA reviewed Curriculum:

- ▶ What Are Capital Markets?
- ▶ What Is A Stock?
- ▶ What Causes Stock Prices To Change?
- ▶ Buy, Sell Or Hold?



**Materials Include:** Videos, powerpoint presentations with notes, online short-courses for educators or volunteers, online interactive worksheets and pre/post tests to assess progress and learning are all at your disposal.

“These materials are comprehensive, contemporary and easy to use!”

— SMG Teacher

## TEACHERS, EDUCATORS & SMG ADVISORS

If you are a teacher or after-school provider wanting to bring the real world of finance and capital markets to your students, register your class or afterschool program and the SIFMA Foundation will help you find a match. You might request an in-person or virtual engagement, bringing a financial professional to you in class live or via video chat or Q & A.

“Education in our field is so hard to find... so when professionals speak, it illustrates hands on and provides credibility to curriculum.”


— SMG Teacher



## DID YOU KNOW?

 Nearly **90%** of respondents in a nationwide survey stated that they believe financial education should be taught in schools.

 **84%** of teens report looking to their parents for information on how to manage money.

 **34%** of parents say their family's approach to financial matters is not to discuss finances with their children and "let kids be kids."

 **32%** of teens think their parents don't spend enough time talking to them about managing money, a rise from 21% in 2014.

## Why You Should Invest It Forward

A host of nationwide policy makers are researching the need for programs like the SIFMA Foundation's. We're discovering that overall financial capability is making good strides and paving the way for the SIFMA Foundation to achieve even greater impact. The SIFMA Foundation supports 15,000 educators and 600,000 students grades 4 - 12 annually in their capital markets education journey. Since its launch in April 2014 Invest It Forward™ has reached:

**50**  
STATES

**622**  
INSTITUTIONS

**MORE THAN**  
**100K**



**OVER**  
**760K**  
HOURS OF SERVICE



sifma

**FOUNDATION**

THE STOCK MARKET GAME

investWrite

CHC  
Capitol Hill Challenge

invest it  
FORWARD

The SIFMA Foundation is dedicated to fostering knowledge and understanding of the financial markets for individuals of all backgrounds with a focus on youth.

[www.sifma.org/foundation](http://www.sifma.org/foundation)

## Together we can make a difference

one student, one teacher, one family and one community at a time.

Join us and your peers and Invest It Forward™.

**It's Easy to Register! Visit us at: [investitforward.sifma.org](http://investitforward.sifma.org)**