Wisconsin Bankers FOUNDATION

WISCONSIN BANKERS FOUNDATION
2019-20 BANKERS PROMOTING FINANCIAL LITERACY BANK AWARD APPLICATION

WHY ENTER: This award recognizes Wisconsin Bankers Association member banks' valuable contribution to improving financial literacy in Wisconsin. Winning the award is a well-deserved honor for bank volunteers and raises awareness of each bank's financial education efforts in the communities they serve.

ELIGIBILITY: Any WBA member financial institution may apply for the award, with **one plaque awarded per charter**. ***Please note:*** Individual branch offices should be included in the bank application. All financial education presentations and activities from June 1, 2019, through May 31, 2020, count toward this award.

PRESENTATION OF AWARDS: Banks that meet the criteria on the page three of this application (completing at least three of the seven criteria) receive the **WBF Excellence in Financial Education Award**.

One bank will receive the **Financial Education Innovation Award**, which recognizes an innovative approach to financial education. The winner will be chosen based on responses to Criteria #7 on this Bank Award application.

In addition to the bank awards, each individual who makes a presentation will be awarded a certificate and those who make 20 or more presentations will receive the Certificate of Excellence award and individuals with 5-19 presentations will receive a Certificate of Recognition.

DEADLINE FOR APPLICATIONS: All applications are due no later than **May 31, 2020**. Award applications will not be returned. Email completed applications to Amber Seitz at aseitz@wisbank.com or send via mail to: Wisconsin Bankers Foundation, Attn: Financial Literacy Manager, 4721 S. Biltmore Lane, Madison, WI 53718.

BANK INFORMATION

Please type:

BANK NAME AS IT SHOULD APPEAR ON AWARDS	
BANK STREET ADDRESS	
CITY/STATE/ZIP	
PHONE NUMBER	
BANK CEO/PRESIDENT OR BRANCH MANAGER (NAME, TITLE)	
BANK FINANCIAL LITERACY COORDINATOR (NAME, TITLE)	

NAMES TO APPEAR ON CERTIFICATES

Each banker must have participated in at least one presentation. *Please type*.

NAME (FIRST AND LAST)	BANK NAME AS IT SHOULD APPEAR ON CERTIFICATE (INCLUDE BRANCH CITY IF DESIRED)	TOTAL NUMBER OF PRESENTATIONS

2019-20 Bankers Promoting Financial Literacy Bank Award Criteria

How to fill out this form:

Tally the number of times your bank has met the criteria listed below. The same item may be accomplished more than once (ex: Your bank has 20 staff participating in financial education outreach, so you count 2 for criteria #1.

1. **EITHER** ten (10) or more **OR** 20% of bank staff participated in financial education outreach (gave presentations, conducted bank tours, etc.) between June 1, 2019 and May 31, 2020. **Submit:** List of bank staff participants' names (on previous page).	
2. Over 30 financial education presentations conducted between June 1, 2019 and May 31, 2020. Presentations conducted regularly (see #3) count toward this total. **Submit:** Presentation summaries not previously sent to WBF through the online Presentation Summary form.	
3. Bank staff collaborated regularly with a school or community group to promote financial education (this can be through programs like Junior Achievement, UW-Extension or Make a Difference Wisconsin). **Submit:** Presentation summaries not previously sent to WBF through the online Presentation Summary form.	
4. The bank sends regular communications to customers and the community to promote consumer education (this can be newsletters, website content that is updated regularly, or press releases regarding financial education events and/or shred days). **Submit:** One or two examples of these communications.	
5. The Bank has an in-school branch at any elementary, middle or high school that is open to students on a regular basis. **Submit:** Brief list of branches and which age group(s) they serve.	
6. The Bank offers programs for customers and community members to promote sound financial habits (such as kids accounts and senior saving clubs), or has sponsored a teacher's attendance at a financial education conference such as NIFEL (National Institute of Financial and Economic Literacy) or the Jump$tart Coalition National Educator Conference. **Submit:** Short list of programs or sponsorships.	
7. Innovative or exceptional financial education contribution: This area of the award allows banks to submit a description of one of their own programs to enhance the financial capability of consumers in their community, whether it's a new kind of educational game for students, curriculum developed for adult seminars, or some other new or innovative approach to financial education. Entries in this area will also be reviewed for the Financial Education Innovation Award (see page 1). **Submit:** A detailed description of the activity, product or event **AND** information about how the activity, product or event was marketed and its ultimate reach (total number of attendees).	
CRITERIA MET: *(Must be 3 or more to qualify for a Bank Award)*	