



How to Participate

Every year, hundreds of bankers from around the state use the Wisconsin Bankers Foundation's Reading Raises Interest Kit to provide financial education to the youngest members of their communities. Here's how you can take full advantage of the Kit:

Dates to Remember:

- April is Financial Literacy Month
- Wisconsin Bankers Association Power of Community Week is April 21–26, 2025
- National Teach Children to Save Day is April 24, 2025
- WBF Financial Education Awards Summary Forms are due July 31, 2025 (*learn more below*)

Online Resources:

Available at wisbankfoundation.org/reading-raises-interest-kits

- Take-home handout for students
- Sample email to educators
- News release template
- Archive of previous Reading Raises Interest Kit lesson plans (*physical kits and books are no longer available*)
- List of recommended books

Getting Involved:

1. Plan in advance. Ensure the book provided will align with the age range of your group. If not, more resources and suggested books are available online.
2. Make connections with local educators. These could be school administrators, principals, teachers, librarians, or club leaders.
 - a. Customize the sample email (*available online*) and include an outline of the presentation and sample handouts you plan to utilize.
 - b. Remember: be flexible with your presentation dates and times! Financial education programs using the Kit may be scheduled at the convenience of the banker and the school or group.
3. Practice. Read the story aloud, ask questions, prepare your handouts, and get comfortable with how long your presentation will take.
4. Get creative. In addition to visiting classrooms or hosting events, bankers are encouraged to think outside of the box about how to engage community members — young and old — in the concepts of financial literacy. Here are a few ideas:
 - a. Host a story time session at a local library or bookstore.

- b. Make copies of the recommended financial education books list included in this Kit to distribute to and parents at your bank, local libraries, and bookstores.
- c. Create a “knowledge bank” by donating books to a local library or students in a classroom.
- d. Encourage your library or bookstore to set up displays of financial education books for children, teens, and their parents.
- e. Create a display in your lobby to educate consumers about Financial Literacy Month and Teach Children to Save Day.
- f. Host a financial education presentation with a well-known member of your community, TV news personality, or elected official*.

**Bankers interested in working with an elected official may visit wisbank.com/contact-us for assistance.*

- 5. **Promote your involvement.** The impact of Wisconsin banks on financial literacy is something to celebrate! Here are a few ways you can share the important work you are doing in your communities:
 - a. Include information about National Teach Children to Save Day in your staff newsletter and encourage each other to participate.
 - b. Share about your program in your customer newsletter including photos (with consent) and resources they can use at home.
 - c. Send out press releases prior to and following the events (*sample release available online*). Invite community members to join (if appropriate) or highlight the efforts of your bank to increase financial capability in the community.
 - d. Let the Foundation know! Summary forms highlighting your financial education-related activities will be open through July 31, 2025.

WBF Financial Education Awards Summary Forms:

Available at wisbankfoundation.org/financial-education-awards

Every year, the Wisconsin Bankers Foundation recognizes the outstanding efforts of bankers throughout the state for carrying out a long-standing industry commitment to improving financial literacy. Bankers are **HIGHLY ENCOURAGED** to share their financial education-related presentations with the Foundation by submitting summary forms at wisbankfoundation.org/financial-education-awards.

- 1. **What are the summary forms?** There are two available summary forms: individual and bank-wide.
 - a. The individual presentation form is intended to capture one event or presentation. Bankers participating in Teach Children to Save Day activities should report their individual efforts here. Multiple submissions are encouraged. (*Bankers may need to notify their financial literacy staff liaison or manager of intent to report.*)
 - b. The bank-wide form is intended to encompass the bank’s total effort. This form should be submitted only once per year by a financial literacy staff liaison or manager.

2. Why should I submit my activity? Though submission of your financial education-related activities is not required, it is *highly encouraged*. By letting the Foundation know that you participated, our staff is able to determine the effectiveness of these Kits and recognize bankers for going above and beyond.
3. What recognition could I receive? In submitting the WBF summary forms, individual bankers have the possibility of being named as the Financial Literacy Banker of the Year or receiving the Financial Literacy Banker Award. These two honors are reserved for the bankers who complete the most financial education-related events during the fiscal year.
Additionally, bankers may also receive a Certificate of Excellence (20+ presentations) or Certificate of Recognition (5–19 presentations).
4. How does this impact my bank? Awards presented by the Foundation are visible, tangible evidence of one's commitment to their community and a mark of significant professional accomplishment. The Foundation also supplies sample press releases to banks following the award ceremony — typically at WBA's annual FLEX Retail and Marketing Summit (formerly known as LEAD360) — to publicize the achievement and commitment to the community.
5. How should I submit my form? Summary forms reflecting all financial activities bankers take part in from **June 1, 2023–May 31, 2025**, are now available at wisbankfoundation.org/financial-education-awards.

While the deadline for all activities to be submitted is July 31, 2025, bankers should take advantage of the submit-as-you-go possibility, meaning that every banker has the ability to submit their activity as soon as they finish the presentation!

- Please contact your financial literacy staff liaison to learn more about your bank's process of submitting summary forms. Additional questions can be directed to Katie Reiser at kreiser@wisbank.com.