

CASE Credit Union

Adult Financial Education Initiatives

Certified Financial Counselors

As of May 1st, CASE has 5 certified financial counselors on staff to talk to both credit union members and non-members, one-on-one at no cost to the individual. In 2011-2012, we've had over 300 requests for financial counseling, on topics such as:

- Credit Repair
- Budgeting Help
- Retirement Planning

We've seen even higher numbers at the onslaught of the economic recession. In 2010 we had over 500 requests for financial counseling and in 2009 we had over 560 requests for financial counseling!

Free Seminars and Workshops

Case offers many seminars and workshops to the general public at no cost to them. Some of these seminars topics include:

Identity Theft – How to Protect Yourself
Understanding Your Credit Report
Understanding Social Security Benefits
How to Buy Your First Car
Teaching Your Child the Importance of Saving
Credit Card Presentations – Lansing Community College

On average, we can expect to see 20-25 people in participation at each of these seminars!

Low-Income Initiatives

Just File It - a Web-based program that gives families and individual tax filers FREE access to file for much-needed tax credits and refunds that help lift low-income families and individuals above the poverty line.

Building & Networking

CASE has partnered with many organizations such as CEDAM, Centre for Financial Health, Assets Independence Coalition and Habitat for Humanity to offer credit counseling as well as our SAVE TO WIN product which offers a chance at a grand prize drawing just for making savings deposits.

Youth Financial Education Initiatives

Numbers

As of May 1 CASE has reached 1544 students with Financial Education topics by presenting 63 lessons.

Development

Through input from teachers, CASE continues to provide three series of lessons in classrooms. This allows CASE to reach students on three different financial education topics, three times in a week.

In addition many elementary teachers are asking the Financial Education Coordinator to come back to play the games which are incorporated into all lessons for a longer period of time.

These games have helped to encourage hands on learning and the valuable skill of counting money, while having fun as well.

Example games include:

- The Store (adding money, making change)
- As Fast as you Can (coin counting)
- Jackpot (students pretend they've won a jackpot of money, practice paying for items, counting money, making wise decisions)
- Sack Money (prioritize spending, counting)

School Districts

Ingham County Schools – 53 presentations

Eaton County Schools – 10 presentations

Building & Networking

CASE's Financial Education Program was introduced to the Curriculum Director of Charlotte Public Schools and a meeting took place on April 18 with the Curriculum Director, and principals of Charlotte. The interest in CASE's program is very strong and



discussions are in the works for incorporating the program in the 2012-13 school year for both the High School and Middle School. Charlotte Public Schools is in Eaton County.

Legislative Challenge

CASE has been rescheduled with a new Representative Joan Bauer and planning is underway to provide Eastern High School students with a joint Financial Education presentation in May. Together Senator Joan Bauer and CASE will teach the students the essentials of planning for college.

Updates and Improvements

Parent Letter

A parent letter is now going home with each student after they receive financial education from CASE Credit Union. To date 164 letters have been sent home informing parents of their child's learning through CASE's Financial Education Program.

Financial Ed Events

CASE unveiled three new youth Club Accounts for members' ages 0-18 in April and continues to promote these account in branches, online, through member statements and ad placements.

Youth Week for Credit Union's was April 23-24

The theme this year was super heroes and CASE had its very own Super Hero Saver at each of its Meijer branches during this week. Super Saver Hero provided balloons and stickers to students and told parents about the new CASE Youth Accounts. CASE reached many potential and current members during these visits.

CASE will be attending and participating as a vendor at the 4H Youth Exploration Days. Particularly CASE will help with the Mad City Money simulation taking place. The event is on the campus of MSU on June 21-22. 2400 students attended this event last year.

Planning is underway for CASE to provide an end of year 45 minute version of Mad City Money simulation for Eastern High School students in May or June.

1-25-12

DEAR

MRS V. THANK

YOU FOR THE

COLORING BOOK

AND FOR THE

SAVINGS PLAN YOU

ARE SO SO SO

NICE I HOPE

YOU COME BACK

AND THANK YOU

FOR THE GAMES WE

ARE YOU GOING

TO COME HERE

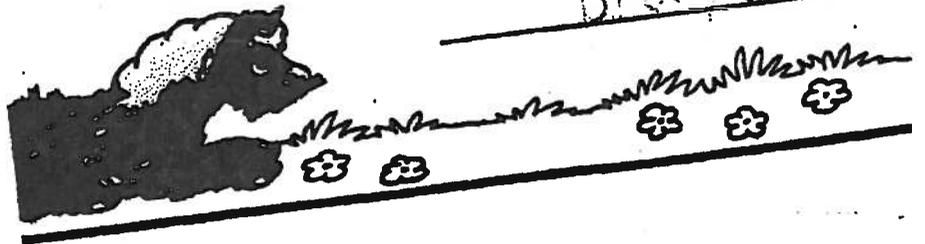
AGAIN BY BY

Sincerely NICHOLAS



Dear Mrs. V
Thank you for telling
us about a Sentinal Day
that was cool. You
were a good teacher
income and expense is
cool. Thank you for
the game.

from
Bradley



1-25-12

Dear MRS. V.

Thank you for coming to our
School. you did a wonderful presentation.
Thank you for Letting us play a
Game with you. and
Thank you for the coloring
book

Sincerely



January 25, 2012

Dear Mrs. Vandermeer,

Thank you for the presentation. I thought you did an excellent job. We have a very large group. The content was perfect and went with our curriculum. The grade level was appropriate - we had a discussion today. I will be contacting you next year for sure, we are going to discuss having you back this year. Once again, Thank-you.

Sincerely,
Chris Howalake