



TRAINING DISCOUNTS

Training Grants are available for staff and volunteers at credit unions up to \$150 million in assets.

The Foundation provides reimbursement for qualified training up to 75% of the cost of training, to a maximum of \$750 per year.

Applicants select the training provider that best meets their needs. Training may be in-person or web-based.

Visit CUFound.Org/Training

ASSET RANGE	REIMB. %	ANNUAL MAX
≤\$75 MILLION	75%	\$750
>\$75 MILLION TO ≤ \$100 MILLION	50%	\$750
> \$100 MILLION TO ≤\$150 MILLION	25%	\$750

 1,258 Training Grant Recipients Since 2006

ROYCROFT MASTERS ADVISORS

Free advisory engagements are available to credit unions up to \$100 million in assets through the Roycroft Masters Advisory Program. Experienced credit union professionals provide short-term, one-on-one engagements offering a fresh perspective, with an unbiased outside perspective.

Advisory concentrations include:

- Preparing & responding to NCUA examinations
- Building your loan portfolio
- Starting new programs or services
- Compensation evaluations
- Effective marketing



Participants receive an initial on-site visit from a Roycroft Master plus follow-up advice and mentoring via phone or email.

As part of the Roycroft Masters Program, the Foundation has negotiated preferred rates from ALM modeling service providers for small credit unions. Visit CUFound.Org/Roycroft for details.

 All MD & DC CUs w/ Assets <\$100M Eligible

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IMPROVING LIVES



Credit Union Foundation MD|DC
Improves Lives
By Working With Credit Unions
To Support Financial Literacy,
Financial Self-Sufficiency &
Personal, Affordable Financial Services

FINANCIAL COUNSELOR CERTIFICATION



Credit unions are in a unique position to help members address their financial success. Having qualified staff who can guide members on improving their personal finances is the first step toward an effective financial counseling offering.

The Foundation, in cooperation with the MD/DC Credit Union Association, offers a Financial Counselor Training & Certification Program.

Under the new program, the Foundation will pay the entire tuition cost for participants in the program and provide partial (up to 75%) reimbursement for course materials for qualified credit unions.

The CUNA-developed course is provided almost entirely online and includes in-person review and certification exams.

Find details at CUFound.Org/Training

FINANCIAL LITERACY GRANTS

The Foundation provides grants to credit unions for financial education programs that benefit members and the community-at-large.

Sample grant awards include matching funding for financial literacy days, financial literacy website development, and joint credit union financial literacy events.

In addition, the Foundation can provide Quicken personal finance software for credit unions to share with members. This valuable tool can be loaded on members' computers and play a valuable role in budget creation and monitoring.

Visit CUFound.Org/FinLit-Grant

 Over 2,000 Attendees

YOUTH-FOCUSED PROGRAMS

THE MILLIONAIRE'S CLUB



Credit unions interested in building youth membership while supporting personal finance skills have joined with the Foundation to establish The Millionaire's Club financial literacy experience in local high schools and organizations.

Developed by a team of credit union professionals, financial literacy experts, and educators, the Millionaire's Club has grown from a two-site pilot program to more than fifty locations in six states and the District of Columbia.

Clubs are provided materials, supplies, and seed funding needed to launch and deliver the comprehensive personal finance curriculum in an engaging club-like setting. Lessons include budgeting, investing, credit, career choices, and insurance. The students' annual entrepreneurial project reinforces subject matter and generates funds to sustain Clubs.

Credit unions serve as Club Sponsors and provide occasional guest speakers on topics such as budgeting, credit, and choosing a financial institution. Local, regional, and national competitions complete the program.

Visit MillionairesClub.Org

 2,000+
Participants Annually

COLLEGE SCHOLARSHIPS

The annual Credit Union College Scholarship Program is available for all MD & DC-based credit unions to offer to their members.

Applicants vie for \$12,000 in scholarships, and may apply in three separate categories:

- Essay-based - Topics commonly relate to financial literacy issues or ways that credit unions can best serve youth markets
- Video-based - One-minute videos showcase the creativity of young members
- Photo-based - Applicants submit photos that depict a credit union value

Young credit union members directly benefit from scholarship awards while becoming better members as they learn about their credit union. Online applications ease participation and free, ready-to-use promotional materials help credit unions promote the scholarships to their members.

Over the program's history, the Foundation has awarded over \$263,000 in scholarships.

Visit CUFound.Org/CUScholarship to view details and resource materials to help promote the scholarship program to your members.

 \$263,000 In Scholarships Awarded Since 1991

