



# Raising the Bar Financial Literacy in Canada

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# The CPA Canada Solution to Financial Literacy

## PROBLEM:

Canadians need help managing money



## SOLUTION:

- CPAs uniquely positioned to help
- Deliver objective financial literacy education through our member volunteer network

# Delivery: Community Connect Network

11k members deliver financial literacy education sessions nationally at grassroots level.

## Seven Key Areas:

- Adults
- Workplace
- New Canadians
- School (Elementary & High School)
- Post-Secondary Students
- Small & Medium Businesses
- Entrepreneurs



# Why Members Volunteer

## CPAs already volunteers/want to give back

- Training sessions in-person, online
- Easy to get started
- Flexible
- Menu approach
- Local delivery
- Networking
- Member pride



# Rules of Engagement

- Help Line – fast, responsive customer service
- Communication – monthly e-newsletter by region
- Tiered Structure – Regional Advisory Boards, Area Leader coordinators
- Annual recognition events
- Awards program
- Webinars, videos highlight benefits of volunteering



# The CPA Canada Solution to Financial Literacy



You bring the  
audience and  
the venue.



- **Lunch'n Learn**
- **CPAs deliver the programs**
- **Free**
- **Not selling anything**
- **6 topics**

# Our delivery channels

- **In-person channels include:**
  - Workplace
  - Schools
  - Libraries
  - Community agencies
  - Tax clinics
- **Online channels include:**
  - Electronic sessions and webinars to reach broader audience, difficult geographies.



# What's in it for You?

- Credible content presented by CPA expert
- Supplements other programs
- Flexible
- Easy to access

**FREE!!**





# How to get started?

- Visit [cpacanada.ca/financialliteracy](http://cpacanada.ca/financialliteracy)
  - General information on the program
  - Financial literacy education we offer (*request a session here*)
  - Latest resources, news and blog
- Request a session
- CPA staff will contact you



# In Summary

- ✓ Award-winning program – proven track record
- ✓ Free
- ✓ Objective
- ✓ Accessible
- ✓ Public service
- ✓ Win. Win. Win.

