



QUARTERLY PROGRAM MEETING MAY 25, 2021

Angela Caban, Director
Lila Quintiliani, Senior Program Manager
Jackie Toops, Program Coordinator

Agenda

2:00 – 2:05 Welcome

2:05 – 2:15 Military Saves 2021 Saver Survey

2:15 – 2:45 Military Saves Month 2021

2:45 – 3:00 Around the table - All

MAY 17-JUNE 18

We Want to Know!



2021
SAVER
SURVEY

militarysaves.org/survey

- The results will allow us to gain powerful insights and analyze trends related to the financial wellness of the military and veteran communities.
- In 2019, the biggest saving barrier (57%) the military/veteran community faced was unexpected expenses.
- 2021 will focus on how COVID-19 has impacted saving.
- This data helps us to improve our program and helps supporting organizations (YOU) better understand the realities and challenges military/veteran communities face when it comes to finances.

2021 Military Saves Saver Survey

Survey and Personal Goals

Thanks for taking the time to share your thoughts and feelings about saving and the Military Saves program. Your feedback helps Military Saves continue to improve our work to meet your needs.

This should take 5 to 7 minutes of your time.

Please answer questions from your own point of view.

(for example, if you are a military spouse, please answer for yourself, not the service member)

Upon completion of the survey you will be eligible to enter for a chance to win **\$500**.

Your individual answers will remain confidential.

* 1. What is your TOP savings goal?

- | | |
|---|---|
| <input type="radio"/> Credit card / other debt repayment | <input type="radio"/> Large purchase (car, furniture, electronics, etc.) |
| <input type="radio"/> Education (own or children's) | <input type="radio"/> Retirement |
| <input type="radio"/> Emergency fund | <input type="radio"/> Special event (vacation, wedding, etc.) |
| <input type="radio"/> Housing (homeownership, home improvement, etc.) | <input type="radio"/> Transition fund (move, PCS, TDY, transition to civilian life) |
| <input type="radio"/> Investment savings | <input type="radio"/> Do not have a savings goal |
| <input type="radio"/> Other (please specify) | |
-

- The survey is open to all military service members (active, guard, and reserve), family members, veterans, and their families, and DoD employees.
- Respondents should complete the survey from their own unique perspective. Ex. military spouses should complete the survey as themselves, rather than on behalf of the service member, and vice-versa.
- The anonymous survey will take approximately 5-7 minutes to complete.
- As a way of showing our appreciation, each respondent will be eligible to enter into our weekly drawing for a \$500 cash prize.

2021 Military Saves Saver Survey

Here's How You Can Help:

- Ready-to-share social media and email content created for you.
- Share until June 18, 2021.
- Please use the hashtags on social media: #SaverSurvey21 #MilitarySaves, and tag us: Facebook, Twitter and LinkedIn: @militarysaves, Instagram: @military.saves
- To access the survey digital toolkit, go to: <https://militarysaves.org/organizations/partner-resource-packets/survey-toolkit>

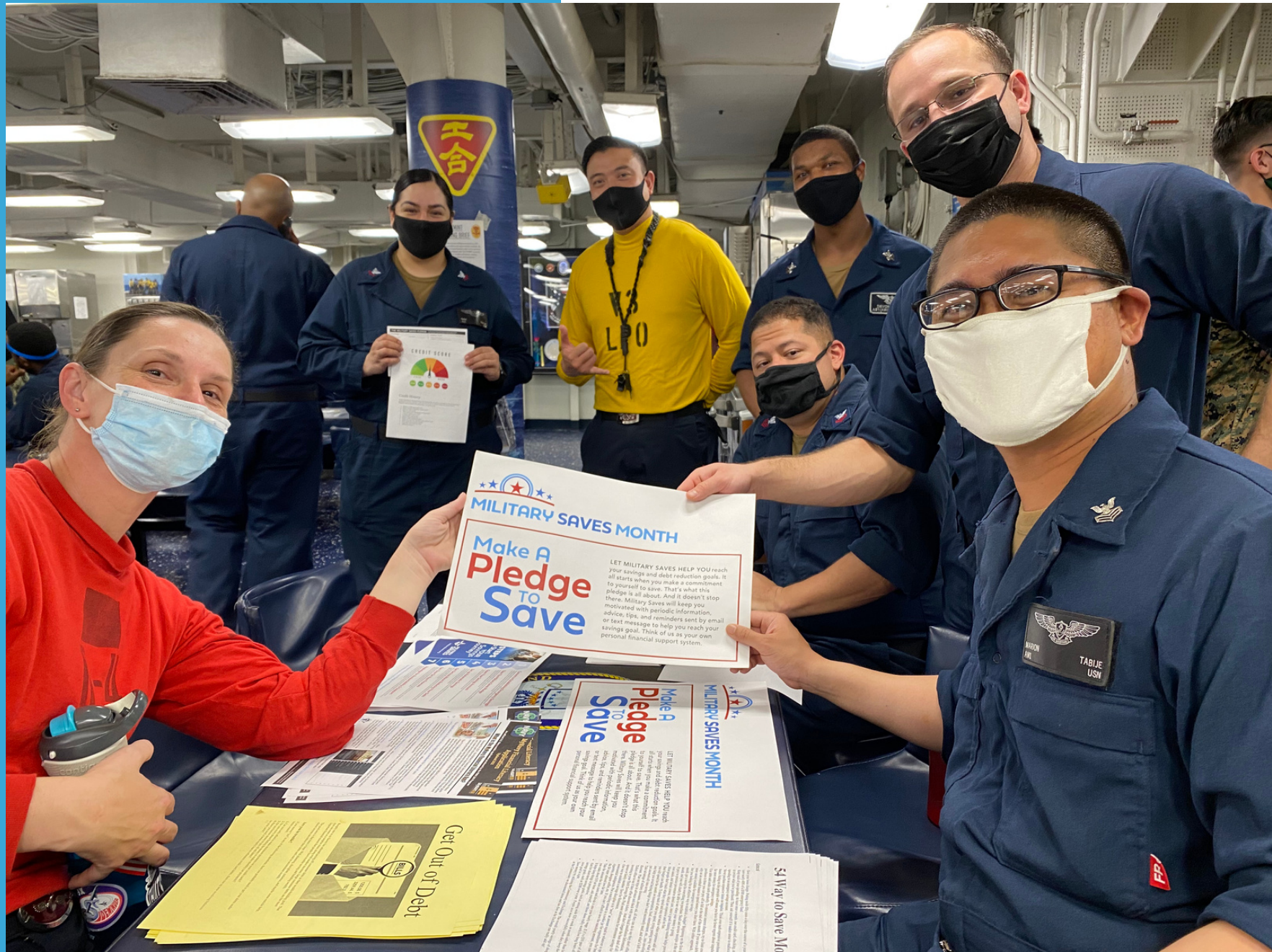
Presenting Donor:



Gold Donors:



DCUC
DEFENSE CREDIT UNION COUNCIL



Military Saves Month 2021 Highlights



- Participation from over 500 organizations.
- Encouraging the military and veteran communities to pause for a financial check-in and evaluate their savings behaviors.
- Resources, tools, and tips were created and shared to motivate families to build or increase their personal savings.
- Social marketing campaign efforts reached over 10.7 million within the military and veteran communities.

2021 Military Saves Month

Top 5 Saving Goals:



Emergency Fund



General Savings



Housing



Retirement



Vacation/Event



Military Saves Month 2021 Report

Full report available June 2021
Visit www.militarysaves.org

Savings Champion Award

The Savings Champion Award is a national recognition that is awarded by Military Saves with the support of a selection committee comprised of staff and leadership.

Winners will be recognized by:

- Recognition on [MilitarySaves.org](https://militarysaves.org), social media, and email communications.
- Recognition in a national press release.
- Digital badge for your website and digital certificate.

Organizations must:

- Be signed up to participate in Military Saves Month.
- Encourage the Military Saves Pledge, and promote MSM through events social activities.



- American Armed Forces Mutual Aid Association
- AmeriForce Media
- Association of Military Banks of America
- CollegeAdvantage Ohio's 529 Plan/ Ohio Tuition Trust Authority
- Defense Credit Union Council
- Experian
- First Command of DuPont, WA
- FINRA Investor Education Foundation
- Harris Financial Coaching
- Michael Walters Advertising
- New Jersey Bureau of Securities
- National Foundation for Credit Counseling
- Securities Division - TN Department of Commerce & Insurance
- Silicon Valley/ South Bay SAVES
- USS Makin Island, Navy
- USS John C. Stennis, Navy
- United States Securities and Exchange Commission

Designation of Savings Excellence Award

The Designation of Savings Excellence Award is a national recognition for financial institutions that is awarded by Military Saves with the support of staff and leadership.

Winners will be recognized by:

- Military Saves Designation of Savings Excellence Award.
- A digital seal to display on your website and share on social media.
- Recognition on MilitarySaves.org.
- Recognition in a national press release.

Organizations must:

- Be signed up to participate in Military Saves Month.
- Encourage the Military Saves Pledge, and promote MSM through events social activities.



Banks:

- First Arkansas Bank and Trust
- USAA
- Wells Fargo

Credit Unions:

- Community Resource Federal Credit Union
- Hanscom Federal Credit Union
- Navy Federal Credit Union
- New Horizons Credit Union
- PenFed Credit Union
- Scott Credit Union
- Travis Credit Union
- Pioneer Valley Credit Union

SAVE THE DATE
Quarterly Program Meeting
September 7, 2021 @ 2 p.m.

QUESTIONS?

INFO@MILITARYSAVES.ORG