



**MILITARY
SAVES**

Quarterly Program Meeting September 22, 2020

Agenda

1:00 – 1:05 Welcome - Angela Caban, MS

1:05 – 1:15 Military Saves Updates & Events - Lila Quintiliani, MS

1:15 – 1:25 Military Saves COVID-19 Strategy - Angela Caban, MS

1:25 – 1:40 Partner Spotlight: Yellow Ribbon Network - Kyle Vanschoyck, YRN

1:40 – 2:00 Around the table - All

- Share how you are doing and what are you working on.
- How can MS support?
- Q&A

2:00 Meeting Adjourned - Angela Caban, Military Saves



Military Saves' researched-based work to improve the saving behavior of the military community is supported by the generous contribution of Wells Fargo Foundation.



Program Updates & Events



**Town Hall
CONVERSATIONS**

Save The Date

AMERICA SAVES PRESENTS

October 22nd: #ThinkLikeASaver: Simple Strategies To Help You Save

November 5th: #ThinkLikeASaver: How Do I Pay Off Debt?

November 19th: #ThinkLikeASaver: Saving For Major Life Milestones

All Dates @ 2PM ET

**AMERICA
SAVES**
AMERICASAVES.ORG



Program Updates & Events

-Facebook Live Events:

- Disasters Don't Wait – Live with FEMA on September 23rd @ 2pm ET
- Monthly Midday Money Chats – September 30th @ 2pm ET

-The America Saves Summit: December 2, 2020

-Military Saves Month, April 2021

-Military Saves 2021 Saver Survey: Launches summer 2021



COVID-19 Strategy

The Savings Crisis: Social Marketing & Analysis

- Utilize the 2021 Military Saves Saver Survey to identify key pandemic pain points.
- Adding demographic specific questions such as; component (veterans, National Guard, Reserve), gender and race on the Military Saves Pledge and the Military Saves Saver Survey.
- Messaging that meets the Saver where they are. This includes content based on the DoD's Lifecycle Touchpoints.
- Sharing updated resources from valued partners.



COVID-19 Strategy

The Savings Crisis: Key Takeaways for Collaboration

1. We have the opportunity to address emergency savings and keep savers on track to reach their financial goals.
2. Engage in conversations to explore how financial wellness can be enhanced with emergency savings solutions.
3. Military Saves Saver Survey 2021 collaboration on savings challenges and overall findings.



Partner Spotlight: Yellow Ribbon Network



-Partnership began in March 2020

- Savers able to Opt-In to Financial Counseling as part of pledge.
- YRN added Military Saves info to Hero My Budget/Directory Sections.
- Began COVID-19 related counseling effort in April – Military Saves added link to their own COVID-19 resources section recently.
- YRN tracks demographics and outcomes of counseling sessions for each person and provides further assistance as needed.



Military Saves is a certified Yellow Ribbon Network partner and uses the system for file management and communication purposes.

New User?

REQUEST ASSISTANCE

Already Registered?

Username *

Password *

LOG IN

- Savers create YRN Hero Profile & are populated on Military Saves Partner Dashboard
 - Approx. 45 demographic data points are collected
- Cases get assigned to VeteransPlus
 - VeteransPlus counselors are AFCPE Accredited (or in practicum) and are Veterans and/or Military Spouses
- In-depth Financial Assessment is conducted
 - Assets, Income, Liabilities, Expenses are analyzed, and an Action Plan is provided
 - ALL data flows back to Military Saves



- ←
- Dashboard
- My Profile
- Request Assistance
- My Requests
- My Documents
- Messages 56
- My Tasks
- My Budget**
- My Employment
- Resource Directory
- VA Grant Eligibility

My Budget

Use the tools below to create indepth financial self assessments as well as shorter monthly budget plans. These will aid non-profits and independent counselors providing you financial coaching/counseling or wealth management advice. You can also get free credit scores without impact to your credit report below. [Click Here](#) to request financial related counseling.

SELF FINANCIAL ASSESSMENT

MONTHLY BUDGET TOOL

Show entries

Search:

Document Type	Title	Uploaded On	Action
No Data Available In Table			

Showing 0 to 0 of 0 entries

Take the Military Saves Pledge

The Yellow Ribbon Network has partnered with Military Saves to help families commit to financial fitness through a savings plan. Make a pledge to yourself and create a simple savings plan that works. Complete the Pledge and Military Saves will send you short email and text reminders, resources, and tips to keep you on track toward your savings goal.

Click the logo below to get started now!




Credit Reports

Please use one of the free credit report sources below to monitor your credit score. We recommend you run a credit report atleast once every 3 months. Once you receive the report, upload it below after filling in the corresponding information. Obtaining your credit report from either of the services below will not impact your score.

Uploaded reports will automatically populate in the My Documents section of this portal as well.

Annual Credit

- My Profile
- Request Assistance
- My Requests
- My Documents
- Messages 56
- My Tasks
- My Budget
- My Employment
- Resource Directory**
- VA Grant Eligibility
- Support

National Resource Directory 

Know of a resource that should be listed below? [Click here](#) to refer them to the YRN



Keyword

Zip Code

Distance

CAREER JOB FAIR INFORMATION
LOCATE AND/OR SUBMIT INFORMATION FOR AN UPCOMING
HIRING EVENT IN THIS NEWLY CREATED SEPARATE SECTION

SEARCH

- Organization - Military Saves**
Address: 1620 I Street NW, Suite 200, Washington, DC, 20006
Phone Number: 202-642-5247
About: Military Saves, a component of America Saves, and a participant in the Department of Defense Financial Readiness Network seeks to motivate, support, and encourage military families to save money, reduce debt, and build wealth.
Website/Link: www.militarysaves.org
Geographic Reach: Nationwide (include all US territories)
Contact Name: Angela Caban
Contact Number: 202-642-5247
Contact Email: acaban@consumerfed.org

0 (0 Ratings) No Ratings
Be the first rate this resource
- Organization - SHOR Financial Wellness, LLC - For Profit Business**
Address: 1520 York Ave, , 30J, New York, NY, 10028
Phone Number: 929-280-4550
About: Provide objective financial coaching to veterans via personal consultations, educational workshops, and web-based resources. Facilitate setting and achieving financial goals. Led by a veterans financial coach with deep experience in the NYC Veterans community as well as expert on VA benefits. Topics covered include develop spending /personal budgets, guidance on building credit, reducing debt, investments, VA home loan program We do not sell products nor are we connected with any financial institution.
Website/Link: www.SHORfinancialcoach.com

0 (0 Ratings) No Ratings
Be the first rate this resource



NON-PROFITS

HEROES

HOW IT WORKS

FEATURES

SUPPORT

MEDIA

LOGIN

DONATE

Efficiency Is Critical

The most comprehensive cloud based software app

▶ See YRN in Action

ATTENTION!

We are currently offering free financial counseling to anyone who has experienced a negative change in income and/or budget due to the recent COVID-19 / Corona Virus situation. If you have a had a negative financial impact for any reason pertaining to this pandemic, OR want to help us in these counseling efforts, please click below.

Click Here to Enroll in COVID-19 Related Financial Counseling

Click Here to Join the Task Force and Provide Financial Counseling

YRN BECOMES HUD COMPLIANT HMIS

Sep. 30, 2020 - Yellow Ribbon Network

Learn More



Non-Profits

Resource Entities

Independent Counselors

Heroes



During this unprecedented time, many individuals and families are struggling with financial uncertainty. Whether you have been laid off, have taken a pay cut, or are simply worried about the future, you don't have to navigate this alone.

A financial counselor or coach will provide you with unbiased, trustworthy advice and help you make a plan...right where you are.

This program is available to EVERYONE. You do not need to be military-affiliated to participate. Sessions are virtual and free. No gimmicks. No sales.

AFCPE's Accredited Financial Counselors® (AFC®) and Financial Fitness Coaches (FFC®) are equipped to help you navigate:

- Managing immediate expenses and preparing for future emergencies.
- Determining which bills to pay first, and which payments can be deferred without getting penalized.
- Building a plan to help you pay off your debt and creating strategies to avoid debt in the future.
- Navigating unemployment benefits and other financial assistance programs.
- Allocating government funding to make the most of your stimulus dollars.

After signing up, a counselor will reach out to you within 48 hours to schedule a virtual appointment at a time that is convenient for you.

Whatever financial success looks like to you, AFCPE® financial counselors and coaches are here to support you.

New User?

SIGN UP TO MEET WITH A COUNSELOR

Already Registered?

Username *

Password *

LOG IN

This program is supported by the generosity of the [Wells Fargo Foundation](#) and delivered in partnership with Yellow Ribbon Network, who has expanded their platform reach to include both military and civilians.





COVID-19 Program Statistics:

- 414 AFCPE Accredited Counselors
 - 193 are Veterans and/or Military Spouses
 - 208 have completed special inclusion training
 - 9 are bilingual
- 300+ Enrollments
 - Approx. 100 Completions (200 in counseling process)
- 4.4/5-Star rating from those completing the survey



- **January 12, 2021**
2 p.m. ET
Q4 Program Meeting

Around the Table

- Share how you are doing and what are you working on.
- How can MS support?
- Q&A

