

FINANCIAL LITERACY

CHAMPIONS EMPOWERMENT PROGRAM



WELCOME

From Canada Life

**Candra See-Toh, AVP Capital Management, Canada Life
Chair Winnipeg Women in Leadership ERG**

I'm proud to be the executive champion for Canada Life's CPA Champions Empowerment Program with CPA Canada.

At Canada Life, we're committed to improving the financial well-being of Canadians. That's why we're proud to support this program – because we can help make a positive impact in the financial wellness journey of Canadians today. We know that financial literacy plays a vital part in creating stronger communities.

Signing up as a new or existing volunteer, is easy – all you need to do is share your knowledge. Every action will help empower kids, teens, adults and seniors at any life stage. Whether through hosting sessions, creating and editing content, doing outreach or promoting financial content, each opportunity to get involved can increase Canadians' confidence about financial wellness.

I look forward to seeing you join me on this meaningful journey.

From CPA Canada's Financial Literacy Team

Introducing the Champions Empowerment Program! CPA Canada's Financial Literacy Team, with the support of Canada Life, is proud to bring exciting volunteer opportunities to CPAs just like you.

Our Financial Literacy Program delivers unbiased and informative financial literacy education to Canadians from all walks of life, and we do this with the efforts of our dedicated volunteers. Being a part of our program as a new or existing volunteer means the opportunity to change the way people learn about money, and in the process improve lives.



Financial Literacy starts with



This is your chance to share your knowledge and expertise as a CPA with those who need it most!

By exploring our different volunteer opportunities, you'll be one of 7000+ CPAs across the country who are helping to make financial literacy education more accessible in their communities.

In this guide, you will:

- o Learn about Canada Life and CPA Canada's collaborative financial literacy efforts
- o Choose your volunteering path and learn more about it
- o Find useful Financial Literacy resources
- o Hear from successful Financial Literacy volunteers at Canada Life

We're glad to have you along for the ride as we continue to grow!

Our History

Since 2014, Canada Life has been proud to support CPA Canada in developing its Financial Literacy program into an expansive and impactful learning initiative. Through our efforts, the program has grown into a network of more than 7,000 CPAs who have volunteered in various roles including presenting over 9,000 financial literacy sessions across the country.

With Canada Life's support, CPA Canada's Financial Literacy program has helped boost financial knowledge in communities just like yours. Financial literacy sessions, research studies, events, podcasts, publications, online resources, and more are all part of our goal to make financial education accessible and enjoyable for everyone.

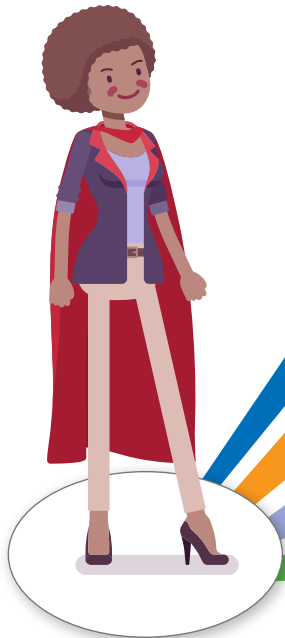
Through our continued collaboration, and with the help and dedication of our devoted volunteers, we look forward to continuing to provide communities around the country with free and accessible financial education for many years to come.



What path will YOU choose?

CPA Canada's Financial Literacy Program is growing every day, and now you can be a part of it.

Choose from any of these exciting options and get involved in a program that is aimed at bettering the lives of Canadians everywhere through the power of financial education!



Session Presenter

Use your knowledge and expertise to present financial literacy sessions on a variety of topics.

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Content Development and Editing

Create session content and showcase your editing skills.

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Outreach

Spread the word and work with host organizations to create learning opportunities.

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Champions of the Profession

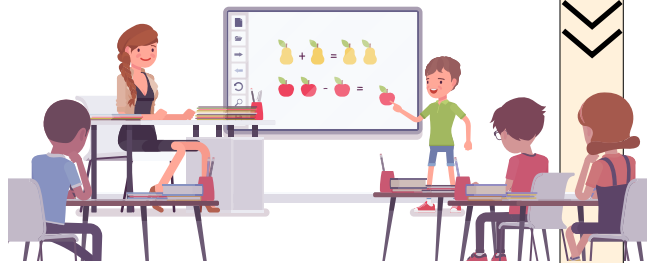
Be the voice of the Financial Literacy program by reaching and connecting with audiences on a larger scale.

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Session Presenter

Where does your expertise lie? No matter which subjects interest you, CPA Canada provides sessions for you to present at organizations across the country. We also encourage you to contact potential host organizations yourself and register the sessions you coordinate.

Talking Money in the Classroom p.9



Early Adulthood p.11



Planning for Family and Retirement p.13



Communities in Need p.19



Money in the World of Business p.17



Living in Retirement p.15

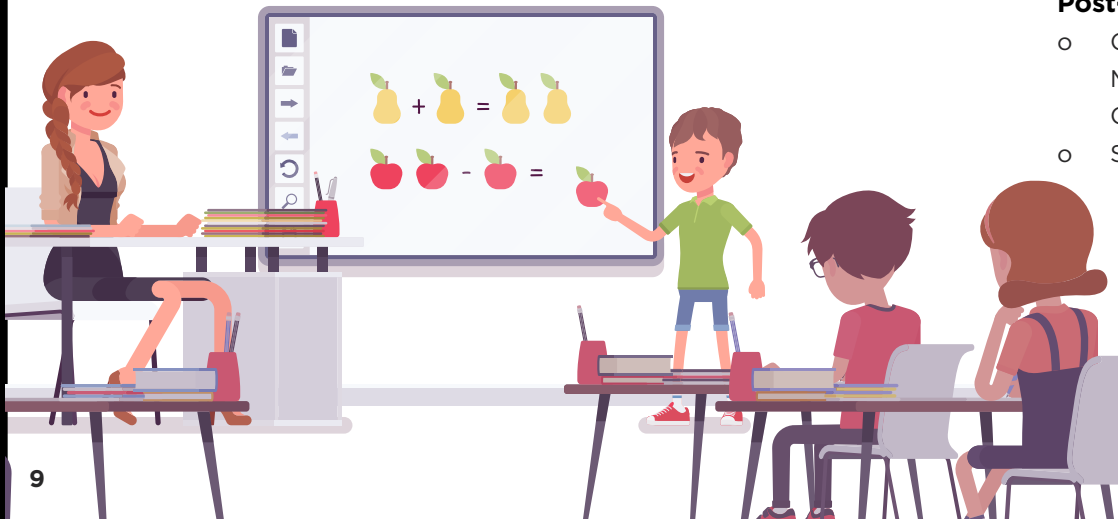


Session Presenter

Talking Money in the Classroom

Congratulations! You've chosen to bring financial literacy into the lives of Canadian students. The classroom is an excellent place to begin learning about money, and children who are educated on personal finance can become money-smart adults who know how to make positive financial decisions.

Through these sessions you'll be on the front lines of providing valuable and trusted information about money to children and young people in your community. Whether you're holding an in-school workshop for a classroom of fourth-graders or presenting tips on managing debt and credit to post-secondary students, you'll be equipping today's youth with the financial know-how they need to become tomorrow's leaders.



What are my options?

Choose to hold in-school workshops for elementary or high school students, or share your expertise with post-secondary students, the choice is yours:

Elementary & High School workshops:

Grades 4 & 5

- o Bartering
- o Needs & Wants
- o Savings & Bank Accounts
- o Pet Shop

Grades 7 & 8

- o Budgeting & Expenses
- o Earning Income
- o Goal Setting
- o Savings & Bank Accounts

Grades 10 & 11

- o Budgeting & Saving
- o Credit Cards & Bad Debt vs. Good Debt
- o Earning Income
- o Goal Setting

Post-secondary Sessions:

- o Own Your Financial Future: Managing Debt and Making Credit Work for You
- o Slaying Your Taxes

Find details under *School Workshops* and *Post-Secondary Sessions* at cpacanada.ca/flschool

Are you ready to start your adventure as a CPA Canada Financial Literacy volunteer?

Great! Your next step is to visit cpacanada.ca/becomeflvolunteer for instructions on how to register, full session descriptions, volunteer materials, and more.

Questions?

Email CPA Canada at financialliteracy@cpacanada.ca

Session Presenter

Early Adulthood

We're glad you're here! Good financial knowledge is key to living a life of less stress and more confidence when it comes to money, and as a session presenter you'll have the unique opportunity to help Canadians get there.

These sessions focus on the most important aspects of money in the early stages of adulthood, from tips on saving and healthy financial management, to effective tax strategy, to recovering after losing a job. You've chosen to help adults make sensible financial choices at a critical time in their lives, so let's get started!



What are my options?

Help Canadians get a running start by lending your expertise and financial knowledge in any of these sessions:

- o Saving Strategies - Easy Concept, Difficult Reality
- o Ten Healthy Habits of Financial Management
- o Effective Tax Strategies
- o Survive and Thrive: Move Ahead Financially After Losing Your Job

Find details under *Adult Sessions* at cpacanada.ca/fladults

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Session Presenter

Planning for Family and Retirement

Excellent choice! Canadian adults have much to consider when it comes to money, and as a volunteer for these insightful sessions, you'll be helping adults with some of the most important financial decisions they'll ever make. No pressure!

Maybe you want to inspire parents to have important money conversations with their children, or perhaps you'd like to help adults get their retirement plans in order. Or maybe you'd like to use your expertise on fraud protection or disability benefits to enrich the lives of those in need. Whichever path you choose, we're sure it'll be the right one.



What are my options?

Choose to lead any of these sessions, and take pride in knowing you'll be making a difference in the lives of your fellow community members:

- o How to Teach Your Kids about Money
- o Are You a Good Financial Role Model?
- o Effective Tax Strategies
- o Planning for Your Retirement
- o Estate Planning
- o Fraud Protection
- o Disability - Accessing Your Benefits

Find details under *Adult Sessions* at cpacanada.ca/fladults



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Session Presenter

Living in Retirement

Welcome! By choosing to explore volunteer opportunities in helping retirees manage and protect their money, you're part of an effort to reduce financial barriers for those in your community who are entering old age.

Retirement is a goal that so many aspire to, and it's important that people have the financial know-how that's necessary to enjoy retirement when the time comes. Unfortunately, retirees are also a common target for fraudsters, so a solid understanding of how to protect one's money in old age can go a long way. All of this is where you come in!



What are my options?

Choose to present any of these three sessions or try your hand at all of them! No matter what your decision, you'll be making a difference:

- o Managing Your Finances in Retirement
- o Fraud Protection for Seniors
- o Estate planning

Find details under *Senior Sessions* at cpacanada.ca/flseniors

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Session Presenter

Money in the World of Business

Time to take care of business! Business owners and entrepreneurs have unique financial goals, responsibilities, and situations, and it's up to you to help them out. When businesses flourish, so do communities, so why not help your own community to get there?

To succeed, businesses and startups require attention to detail, a solid understanding of business finance, hard work, and more. There are ups and downs, twists and turns, and plenty of room for mistakes, but with the right information and a willingness to learn, any business owner or entrepreneur can succeed.

What are my options?

These sessions are geared towards small and medium-sized business owners, as well as entrepreneurs and not-for-profit directors, which means there are plenty of volunteer opportunities for you to explore:

- o Understanding Financial Statements
- o Advanced Financial Statements
- o Understanding Financial Statements for Non-Financial NFP Directors



- o Financial Ratios and Why They Matter to Your Business
- o The Money Side of Business
- o Growth and Expansion: How Best to Grow Your Business
- o Getting Money: What Lenders and Investors Want
- o A Healthy Balance Sheet and Why it Matters
- o Maximize Your Business
- o The Top 5 Common Mistakes Startups Make
- o Financial Survival for Entrepreneurs
- o Your Numbers...Your Story

Find details under *Small & Medium Businesses Sessions* at cpacanada.ca/flsmb and *Entrepreneur Sessions* at cpacanada.ca/flentrepreneurs

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Questions?

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Session Presenter

Communities in Need

You've made a great choice in deciding to help those in special situations overcome unique financial obstacles they may be facing. Financial resources are not always easy to come by, and oftentimes individuals face barriers that are invisible to everyone else.

Financial literacy should be universally accessible, and the communities and individuals these sessions are tailored towards deserve sound financial advice from professionals such as yourself. Explore the numerous ways you can help those new to Canada, people living in remote areas, and anyone who is looking to stretch their dollar further.



What are my options?

A wide variety of sessions means plenty of ways you can help spread financial literacy:

Tips and Secrets Smart Canadians Know

Building Wealth in Canada

What You Need to Know About Tax

Managing Your Money: Planning for Today

- o Managing Your Money: Planning for the Future
- o The Journey Out of Debt
- o Don't Get Scammed
- o Know Your Money
- o Stretching Into Savings
- o Make Tax Your Hero



Find details under *New Canadians Sessions* at cpacanada.ca/fl-newcanadians, *Remote Communities Sessions* at cpacanada.ca/flrc and *Low-Moderate Income Canadians Sessions* at cpacanada.ca/fl-lmcanadians

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Questions?

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Content Development and Editing

We're thrilled you're interested in editing and developing content for the Financial Literacy program! This is an excellent way to share your knowledge and expertise with your fellow volunteers, CPAs, and members of the public.

Session and Financial Content Developer

Interested in working behind the scenes for our financial literacy sessions? As a content developer, you'll play a key role in planning and constructing sessions on whichever topics you feel most qualified to. Turn your knowledge of a specific financial topic into engaging and relevant subject matter.

Technical Editor

If you have a keen eye for detail, you'd be great volunteering in a technical editor role. As a technical editor, you'll have the opportunity to review various materials and content in the Financial Literacy Program, making them look and sound better.

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Great! Your next step is to visit cpacanada.ca/becomeflvolunteer for instructions on how to register and more.

Questions?

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Outreach

Spread the word on Canadian financial literacy! As an outreach volunteer, you'll be the first voice potential host organizations hear when introduced to the Financial Literacy program. It'll be up to you to make a good impression and assure organizations of the program's commitment to excellence and professionalism.

Outreach is a great way to get involved with the Financial Literacy program and leads to substantial and long-lasting professional relationships.

General Outreach

Channel your drive to promote financial literacy into a solid outreach strategy and get to know the program and everything it offers so you can connect with potential session hosts in bold and



meaningful ways. Doing general outreach is the first step in making sure our program reaches a variety of communities across the country.

Area Leader

As an Area Leader you'll take on a dual role of providing general outreach to potential host organizations and co-ordinating volunteers in their specified areas. Our volunteers will look to you for guidance in how they can best take on their roles as representatives of the Financial Literacy program.

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Questions?

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Champions of the Profession

Let's look at the big picture! As a champion of the profession, you'll be reaching a larger audience and getting the word out on a much grander scale, making you an essential voice in promoting the Financial Literacy program.

To be a champion of the profession is to go beyond conventional volunteer opportunities and to put yourself front and center in the effort to reach audiences near and far.

Media Opportunities

Get in front of the media to talk about financial literacy! CPA Canada is always taking on new and exciting projects that we love to talk about including national surveys, events, podcasts, special webinar series, and more. This is your chance to be our voice!



Podcasts

Podcasts are more popular than ever and offer unique and intriguing opportunities to promote the Financial Literacy program. If you love the idea of sharing your thoughts with unique audiences, this is a great choice. Who knows, you may even end up as a guest on our very own financial literacy podcast, Mastering Money!

Events

We hold exciting events centered around many aspects of financial literacy, including our annual Mastering Money conference. If you enjoy the rush that comes with live events and aren't camera shy, taking part in an event could be a great fit for you.

Webinars

Special webinars on unique and interesting topics are always great for drawing a crowd, and leading these webinars presents an exciting chance for volunteers to connect with audiences in profound and meaningful ways.

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Great! Your next step is to email CPA Canada at financialliteracy@cpacanada.ca

Testimonials

Financial literacy is a key competency that many have not had the opportunity to develop. Volunteering and helping someone develop those skills can be a big step for them towards opening doors and providing opportunities for independence. I'm proud to be aligned with CPA Canada and Canada Life, who've made commitments to improving financial literacy for Canadians.

Michelle Gagnon, CPA

AVP Corporate Services at Canada Life,
Chair Pride @ Canada Life ERG

Since 2017, I've been a proud volunteer. The Financial Literacy program is designed for diverse audiences. Participants are intrigued by the variety of topics and are always demonstrating a desire to learn more. An excellent opportunity for CPAs to utilize their financial literacy skills to positively impact the community and economic environment.

Ladelle Baar, CPA, CA

Director, Insurance Taxation & Financial Underwriting Support
Large Case Services, Insurance Solutions, Canada Life

The Financial Literacy program reaches a broad range of people to provide basic financial education to all. I volunteer as a way to give back to Canadians so that they have the required information to make informed financial decisions; decisions which may have a significant impact on their wellbeing.

Joan Presto, CPA, CGA

Director, Investment Financial Reporting, Canada Life

Resources

Financial Literacy Volunteer Resource Centre

cpacanada.ca/financialliteracyvolunteer

CPA Financial Literacy

cpacanada.ca/financialliteracy

Become a Financial Literacy volunteer

cpacanada.ca/becomeflvolunteer

Request a financial literacy session in your community

cpacanada.ca/finlitrequestsession

Financial Literacy Resources

cpacanada.ca/finlitresources

Financial Literacy Publications

cpacanada.ca/financialliteracypublications



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