



Annapolis/Anne Arundel Financial Education Coalition **VOLUNTEER FINANCIAL EDUCATOR AGREEMENT**

AAAFEC Financial Education Classes: The AAAFEC will provide class participants with free, up to date, accurate financial education that does not advertise or market any financial product or service. Financial education classes will be given to the public, community groups, and AAAFEC partner organizations. The goal is for class participants to learn how to make money management decisions that enhance their financial wellbeing.

Volunteer financial educators must:

- Be a member of the AAAFEC.
- Conduct financial education classes, as availability permits, on behalf of the AAAFEC, and at the AAAFEC's request.
- Provide class participants with AAAFEC's handout about AAAFEC's sponsorship.
- Use teaching materials that have been provided by the AAAFEC, or teaching materials that have been approved by the AAAFEC Program Committee.
- Ensure each class participant's privacy by not, under any circumstances, requesting or sharing any personally identifiable information beyond name and email address which will only be used for class registration.
- Use the AAAFEC's evaluation tools to evaluate the quality and impact of the financial education class.
- Provide information about the financial education class to the AAAFEC that includes the number of attendees, the attendees' evaluations, and the educator's own observations and suggestions.
- Have prior experience and/or training teaching financial education or personal finance topics. Experience may be obtained by co-teaching with AAAFEC members who have relevant financial education teaching experience.

Volunteer financial educators must not:

- Sell products or services of any kind to class participants.
- Charge a fee of any kind for financial education classes.
- Give class participants personal financial advice (such as recommending an investment or an investment firm or bank).
- Use or distribute any educational materials or supplies, such as pens or note pads containing logos or other organizational branding, except for AAAFEC-approved financial education materials and supplies from government agencies.

To ensure quality, financial education classes may occasionally be attended by AAAFEC members.

I have read, understand, and agree to the above requirements. I understand that my participation as an AAAFEC volunteer financial educator is contingent on compliance with these requirements.

Signed

Date

Print Name

Employer