



Personal
Finance
Society

MY PERSONAL FINANCE SKILLS



A guide to becoming an Education Champion

Use the tabs at the top of this page to navigate through the toolkit. Wherever you see an icon, this indicates that there's an asset for you to download.

May 2021

The Personal Finance Society's pro bono initiative, My Personal Finance Skills, delivers free financial education workshops to students across the UK through a network of Education Champions who are members of the Personal Finance Society.

Since September 2019, over 600 workshops have taken place across the UK reaching over 18,000 students.

This toolkit has been created to support Personal Finance Society members who wish to support the My Personal Finance Skills initiative by becoming an Education Champion. Education Champions deliver the workshops and talks across the UK to students aged 14-18 years of age. The toolkit is full of information and resources relating to the programme.

“

Students have expressed they should be more of these discussions so that they learn about these issues. The speaker has highly interactive.

”

“

Thank you again for visiting our school and delivering your session on finance scams. We really appreciate outside companies coming to speak with our students and educating them on the important issues that they will face through life.

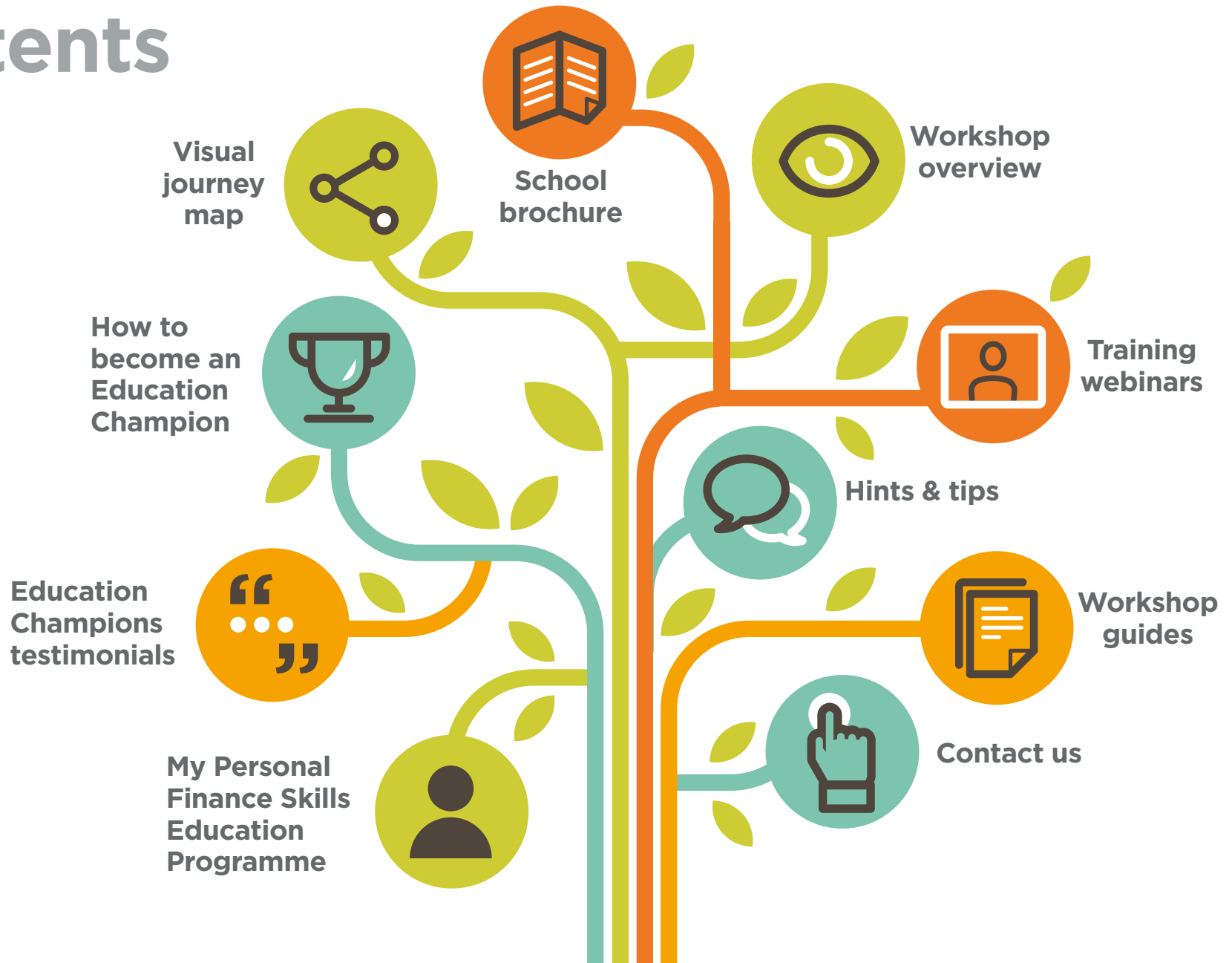
”

“

95%+ of students agree that they have a better understanding of the topics covered. More importantly, all sessions increased students' confidence.

”

Contents



About the programme

The My Personal Finance Skills pro bono initiative delivers financial education workshops to schools and colleges across the UK through a network of Education Champions (members) and aims to be the largest programme of its type in the UK.

The My Personal Finance Skills programme offers schools free workshops covering elements of financial education to schools with themes relevant to students' life stage.

Themes include my future finances, staying safe from financial scams, understanding your first payslip and understanding attitude to risk and how that impacts decision making.

“

As a form tutor to year 12's last year and this year, I can honestly say it was one of the best PSHE lessons from a visitor we had.

Cophall School

”

How to become an Education Champion

Our financial education materials will come with full facilitator notes, a training webinar for support on effective delivery and Education Champions will be expected to complete our financial education sign-off process before delivering their first workshops. More resources will be created to support schools and students as the programme evolves and grows. Find our more [here](#).

Step 1

Register your interest

Step 2

Become an **Education Champion** and receive more information

Step 3

Contact a local school or be matched with a local school

volunteers@thepfs.org



Our sessions are delivered by our network of Education Champions – professional members who are committed to giving something back to their local community.

This is a fantastic way for you to give something back and help young people as they start their journey to adulthood and begin their careers.

Education Champions will be able to access online training and support to use tried and tested collateral so that they can go to schools with the confidence that they can deliver genuine added value content to students.

[Register here](#)

Sample self-assessment feedback form

	Checklist
Read through the workshop presentation guide.	✓
Read through the session PowerPoint in presentation mode	✓
Watched the training webinar in full (if applicable)	✓
Have the following resources: <ul style="list-style-type: none"> • The session PowerPoint • The presentation guide • The accompanying student worksheets (for in-school only) • The feedback forms (for in-school only) 	✓
Have the correct number of worksheets and feedback forms for students (worksheets to be sent prior to the session taking place)	✓
Conducted a virtual test of the platform to ensure you can share screen (for virtual only)	✓
Booked a 15 minute “Using Virtual Platforms” session (if required)	✓



	Strongly agree	Agree	Disagree	Strongly disagree
I had all the information and resources that I required prior to the session.				
I was able to deliver the session within the 1 hour and allowing time for feedback				
I felt confident in my ability to answer questions on the topic				
The PowerPoint and presentation guide supported my delivery of the session				

Meet some of our Education Champions



Michael Maurizi

*"I believe that **it is really important that students are able to access financial education** and that there is often too much of a reliance placed on home/the school system to deliver this when they are not always the best subject matter expert on this topic!"*



Hazel Bowen

"Definitely do it! If the idea of delivering a presentation to school children is outside of your comfort zone, the virtual delivery is perfect."



Dominic McLoughney

*"**The preparation is great from the My Personal Finance Skills team.** The school has asked me to do another session with their 18 year olds and potentially others."*



Dawn Jukes

"I enjoyed running the sessions and would be happy to help again. There was certainly interest in further sessions for different year groups and on different topics."



Jay Dhaliwal

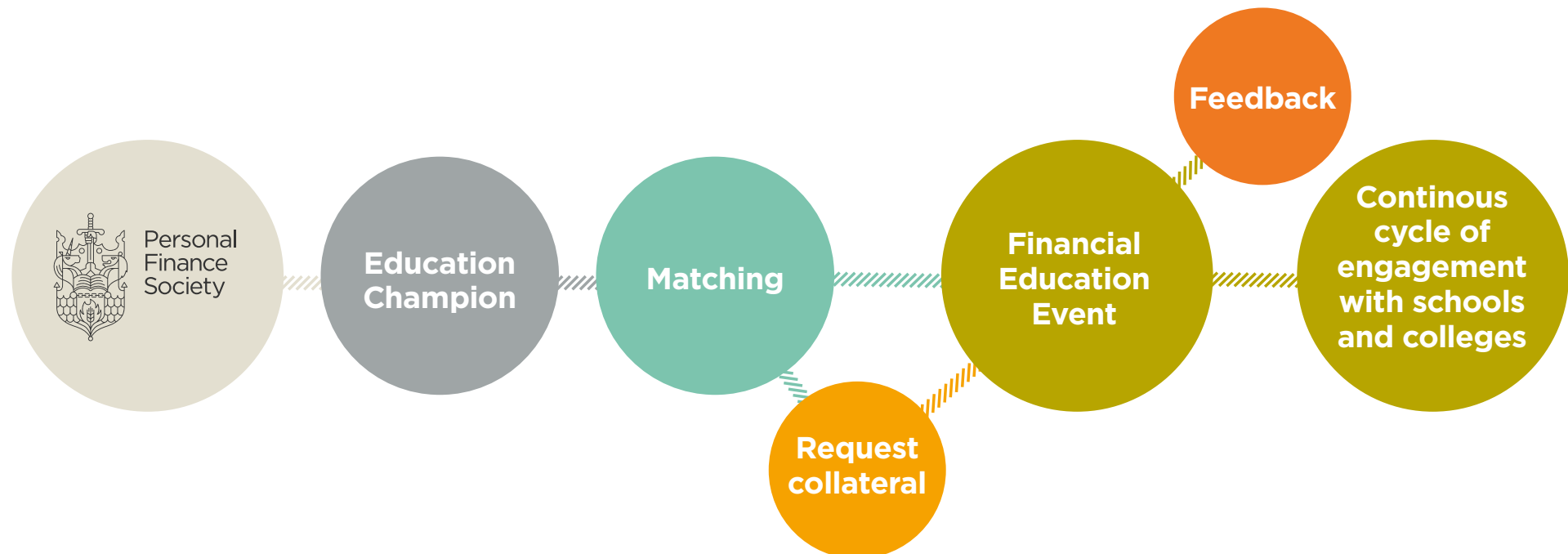
*"**I found the experience really rewarding** - my brother is 16 and it was great to see students of a similar age take an interested in finances. One of the children used the savings plan at the end of the session to save for a laptop in 6 months! And I hope there were some key lessons they took home, like saving from as young as possible and getting into good financial habits."*

Visual journey map for individuals

Members of the Personal Finance Society can sign up and become an Education Champion of the My Personal Finance Skills pro bono initiative. Taking part in this initiative demonstrates your commitment to giving back to your local community and helping to build public trust in this united profession.

Some of the key benefits:

- Giving back to your local community.
- Making a positive impact on society.
- Supporting young people to better understand personal finance.
- Inspiring the future generation into a career in financial services.
- Personal development and improving soft skills.
- Increasing employer brand visibility in local area.



The financial education resources will cover the following themes:

Personal Finance Workshops (60 minutes)

- My future finances
- Staying safe from scams
- Moving on from school
- Making decisions and risk
- Bank Accounts
- Loans & Mortgages
- Understanding Credit

Personal finance talks (30 minutes)

- Identity theft & scams
- Personal finance basics
- Moving on from school

Discover Fortune (60-90 minutes)

- Introduction to a career in personal finance (employability)

Workshops

These workshops are for groups of 30-35 students in KS3-5 (11-18 year olds) and are ideal for enrichment days, PHSE/Citizenship lessons or career insight days and complement existing financial education provision.

While our main form of delivery is through our Education Champions going into schools, we have adapted these workshops to free online sessions delivered by the volunteers and for students to access remotely or as part of independent study to support them with remote financial education provision.

The sessions are delivered within the estimated time of 60 minutes for Workshops and 30 minutes for Talks.



[Download Brochure](#)

My Personal Finance Skills website

The **My Personal Finance Skills** website is full of information and resources to support teachers, students and anyone wishing to learn more about personal finance.

The website has sections with relevant information for Teachers and Students which include:

- Financial Workshop school booking form
- Free online Financial education sessions
- Bitesize Learning videos
- Student Money Blog
- On-Demand videos
- More information about us and the programme

Bitesize learning videos

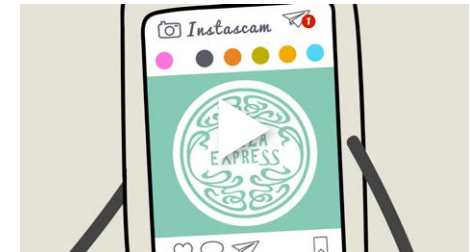


Staying safe from scams

Key vocabulary:

Scams, vishing, smishing, phishing, identity theft

Age range: 14-18yrs



Staying safe on social media

Key vocabulary:

Money mules, sextortion, social media, scams, money

Age range: 14-18yrs



Moving on from school (Part 1)

Key vocabulary:

Payslip, tax, national insurance, student loans

Age range: 14-18yrs



Moving on from school (Part 2)

Key vocabulary:

Payslip, tax, national insurance, student loans

Age range: 14-18yrs

Workshop presentation guides



My Future Finances



Staying safe from scams



Moving on from schools



Making decisions and Risk



Understanding Credit



Bank Accounts



Loans and Mortgages

Talks presentation guides



Moving on from schools



Personal Finance Basics



Identity Theft & Scams

“

Session was informative and easy to comprehend!

Very good. Nice and interactive. 10/10.

Highly productively and educational hour.

Very good presentation, well put together. Engaging and fun.

”

Training webinar videos

These webinars form part of the financial education sign-off process mentioned previously. If you are delivering a personal finance talk, you will not be required to view a training webinar.



My Future Finances



Staying safe from scams



Moving on from schools



Making decisions and Risk



Understanding Credit



Bank Accounts



Loans and Mortgages



Discover Fortunes

What you can do to support:

- Become an Education Champion
- Volunteer to deliver workshops in schools/ virtually
- Spread the word about our pro bono Personal Finance Society Educational programme
- Provide leads for schools in your area
- Support with the programme by contributing to the Vlog/ Blog
- Contribute to the On-Demand voice overs
- Become an Education Champion Ambassador in your region
- Email us to find out about live school workshop opportunities
- Contacts if you have any other ideas



“

Delivering sessions virtually is very efficient, it takes less preparation, travel time and fits into lessons. The face to face sessions are great fun too.

”

Hints & tips include:

- There should always be a staff member presence
- Never give out your personal details
- Keep an eye on timings
- Speak slowly and clearly
- Ask questions and connect with your audience
- Make sure your audience understands the task
- Thank young people for their contributions even if they get the answer wrong, and recognise achievement
- Recap learning at the end of the activity
- Smile and enjoy yourself!
- Read through the presentation guides
- Access the training webinar for the workshops
- Complete a practice run (at home or at work)
- Be mindful of your audience – what to say and what not to say
- Acronyms (always follow up with short explanation)
- Listen unconditionally without judging or showing shock or any sign of disbelief;
- Only ask necessary and open questions - (Who? What? Where? When?) that will clarify exactly what is being disclosed;
- If a young person is looking for additional information following an activity, do not share personal information - All questions and answers should be routed via the school or the My Personal Finance Skills Team.

A member of the team will always be available to support and assist you at each step of the way

Contact

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Website

My Personal Finance Skills
The Personal Finance Society

Email: volunteers@thepfs.org

Feedback

We welcome your input on this toolkit, including ideas for inclusion and improvement. If you have any suggestions please contact your dedicated Personal Finance Skills Teams on **volunteers@thepfs.org**

