



Financial Capability Request Form

Submit completed form to:

InTouch Credit Union
c/o Community Involvement
P.O. Box 250169
Plano, TX 75025

Or email to community@itcu.org

Thank you for thinking of InTouch Credit Union to partner with your school/organization for help with providing financial education and capability to your students/teams.

The following are the available options from InTouch Credit Union:

- **Classroom Seminars**
 - ITCU will send volunteers to speak to your class/group around a specific financial topic or a set series of topics. Topics will be coordinated with requester.
- **CU@School Days**
 - ITCU will have a table on campus to promote savings, teach students the process of interacting with a teller and banker, quiz students on financial knowledge, and assist parents/teachers in enrolling students in a savings account program (parents and teachers may sign up for the credit union, as well.) **Membership subject to availability, please visit www.itcu.org for more information.*
- **Community/Staff/Team Seminars**
 - These are like the classroom seminars but are geared more towards the life stages, events, and topics that parents, teachers, and adults will encounter. This is a great benefit for staff and PTA members.
- **Reality/Retirement Fairs**
 - Reality Fairs take participants through a month-long journey on budgeting, spending, and saving based on a simulated life. Each life is different, and the participants will have to make choices and see the consequences of those choices and how quickly money is moved and managed. Reality Fairs timing will vary depending on number of participants and available volunteers. **Please note these are limited to 9th grade and up.*
 - Retirement Fairs work like Reality Fairs but are focused on current habits and how those could translate into retirement planning and expenses. Retirement Fair timing will vary depending on number of participants and available volunteers. These are best for ages 25 and up, but open to anyone.

Requester's Information

Requesting Individual's Name:

Requesting Individual's Role/Title:

Street Address of school/organization:

City, State and Zip Code:

Phone Number:

Email:

Number of students/attendees:

Number of class periods/sessions:

Classroom/Daily Schedule (include separate section if your school also has a pep rally schedule):

Questionnaire-Please answer the following questions:

Have you had an ITCU speaker/presenter visit before? If so, when?

If you have not had ITCU out before, how did you hear about our program?

What is your overall goal with this partnership program?

Which program(s) are you interested in? If more than one, please list in order of most to least preferred.

Please note that InTouch Credit Union will do its best to honor requests, but all requests are subject to availability. All options above are complimentary and come at no cost to the school/organization.

