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PRESS RELEASE

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SEC Encourages Investors to Plan for Their Financial Future During Financial Capability Month

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Washington D.C., April 2, 2024 — The Securities and Exchange Commission’s Office of Investor Education and Advocacy (OIEA) today announced that its theme for April’s National Financial Capability Month is, “What does your financial future look like? Having a plan can help answer the question.”

During the month of April, SEC leadership and staff will highlight the importance of creating a saving and investing plan to help investors meet their financial goals, and will encourage them to take advantage of the free tools and resources available on [Investor.gov](#). Investor education events will take place across the U.S. with various audiences, including students, underrepresented communities, older investors, and the military.

“Investors turn to our capital markets every day, whether to grow a nest egg, plan for retirement, save for an education, or prepare for the inevitable bumps along the way,” said SEC Chair Gary Gensler. “To be an informed investor is to be a more effective investor, and I encourage the public to take advantage of the many resources we offer on Investor.gov.”

Some of the SEC’s latest resources to educate investors about the importance of financial capability and avoiding fraud, include:

- April’s Financial Capability Month Investing [Quiz](#);
- A new [Guide for Older Investors](#);
- A Military Investor Bulletin, “[Making the Most of Lump Sum Benefits](#)”;
- An Investor Alert: “[Artificial Intelligence \(AI\) and Investment Fraud](#)”; and
- An article from OIEA Director Lori Schock, “[Loud \(and Proud\) Budgeting May Help You Stick To Your Saving and Investing Plan](#)”

“The loud budgeting concept can be an empowering way to take control of your financial future,” said Director Lori Schock. “Creating a saving and investing plan that helps you meet your financial goals and sharing those ideals and goals with your family and friends may not only help you stay more committed to your decision-making but can provide you with support to help you stick with your plan for the long term.”

Some of the SEC’s events planned for Financial Capability Month, include reaching out to the following:

Older Investors – As part of its ongoing [Never Stop Learning initiative](#), OIEA leadership and staff will participate in interviews, webinars, and other events aimed at providing investor education and fraud prevention resources to older investors. OIEA leadership will appear on a Facebook Live event with the AARP Fraud Watch Network and The Senior Zone radio program. SEC regional office and headquarters staff will conduct webinars and give presentations to older adults at public libraries and community centers.

High School and College Students – OIEA staff will lead financial education activities for high school and college students throughout the month. OIEA staff will present to Washington, D.C., public high school students, leading lessons on investor education basics and concepts like the power of compound growth and avoiding scams. Staff will engage with additional schools to educate high school students about the importance of building wealth throughout their lifetime and help them realize the benefits of starting young to grow their money over time. OIEA staff will give guest lectures to college students at Haskell Indian Nations University, Kansas State University, and Dalton State College. Guest lectures will cover investor education topics, such as the relationship between paying down debt, saving and investing, how to avoid fraud, and the importance of creating a saving and investing plan. OIEA staff will also join financial education events for students and young adults hosted by the New York City Bar Association. SEC regional office and headquarters staff will also present to Historically Black College and University student groups at Morgan State University and other universities and community colleges.

Service Members – OIEA staff will present to service members at military installations across the country. Programs will focus on building wealth, protecting investments by recognizing and avoiding scams, and discussing the benefits of tax-advantaged retirement plans, including the military’s Thrift Savings Plan. Outreach events will include active duty, reserve, and retired service members, as well as veterans and military families. This work builds on the SEC’s ongoing investor education outreach with service members, veterans, and their families.

Community Organizations and Affinity Groups – OIEA staff will conduct “train the trainer” sessions for financial educators at the Creating Assets, Savings and Hope (CASH) Campaign of Maryland Financial Education Summit. OIEA staff will also present a Building Wealth Over Time workshop to Howard County, Maryland, community members as part of their Money Matters community event series. OIEA staff will participate in a Washington, D.C., job training and life skills event for formerly incarcerated citizens. SEC regional office and headquarters staff will engage in dozens of outreach events across the country, including investor education presentations to employee groups, women’s groups, and more.

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