Raising the Bar
Financial Literacy in Canada

Presented by:
Cairine Wilson,
Vice President, Corporate Citizenship
CPA Canada
The CPA Canada Solution to Financial Literacy

**PROBLEM:**
Canadians need help managing money

**SOLUTION:**
- CPAs uniquely positioned to help
- Deliver objective financial literacy education through our member volunteer network
Delivery: Community Connect Network

11k members deliver financial literacy education sessions nationally at grassroots level.

Seven Key Areas:

- Adults
- Workplace
- New Canadians
- School (Elementary & High School)
- Post-Secondary Students
- Small & Medium Businesses
- Entrepreneurs
Why Members Volunteer

CPAs already volunteers/want to give back

• Training sessions in-person, online
• Easy to get started
• Flexible
• Menu approach
• Local delivery
• Networking
• Member pride
Rules of Engagement

- Help Line – fast, responsive customer service
- Communication – monthly e-newsletter by region
- Tiered Structure – Regional Advisory Boards, Area Leader coordinators
- Annual recognition events
- Awards program
- Webinars, videos highlight benefits of volunteering
The CPA Canada Solution to Financial Literacy

You bring the audience and the venue.

- Lunch’n Learn
- CPAs deliver the programs
- Free
- Not selling anything
- 6 topics
Our delivery channels

- **In-person channels include:**
  - Workplace
  - Schools
  - Libraries
  - Community agencies
  - Tax clinics

- **Online channels include:**
  - Electronic sessions and webinars to reach broader audience, difficult geographies.
What’s in it for You?

- Credible content presented by CPA expert
- Supplements other programs
- Flexible
- Easy to access

FREE!!
How to get started?

• Visit cpacanada.ca/financialliteracy
  ▪ General information on the program
  ▪ Financial literacy education we offer (*request a session here*)
  ▪ Latest resources, news and blog

• Request a session

• CPA staff will contact you
In Summary

✓ Award-winning program – proven track record
✓ Free
✓ Objective
✓ Accessible
✓ Public service
✓ Win. Win. Win.