

AssetPlatform.org

Financial tools to serve your community

The screenshot shows the AssetPlatform.org website. At the top, the logo and tagline are displayed. Below is a navigation menu with links for Home, Resources, Training, Tools, Products, About Us, and Manage. The main content area is divided into several sections:

- Resources:** A sidebar with categories: Budgeting, Savings, Debt, Credit Score, Insurance/Safety Net, and Organizational Resources. Each category has a brief description of the tools available.
- Welcome to AssetPlatform.org:** A central section featuring a photo of three people in a meeting. The text below explains that the platform is a resource for staff at nonprofit organizations, providing financial education, coaching, and asset development services. It also mentions that the platform is developed by the Aspen Institute in partnership with the Center for the Study of Social Policy.
- Keyword Search:** A search bar with a 'Search' button and social media links for Facebook, Twitter, and LinkedIn.
- Favorites:** A section titled 'Click on Monthly Favorites' listing various financial tools like 'Coming Soon!', 'Promoting U.S. Savings Bonds at Tax Time - NGW!', 'Debt in Focus - NGW!', and 'Savings Rates Sites'.
- Polls and Ratings:** A section titled 'Poll: Results' with the question 'What is your client's most common financial goal?'. The poll options are: 'Get out of debt', 'Manage their budgets better', 'Buy a home, car or other large purchase', 'Build general or emergency savings', 'Address immediate financial crisis (e.g. late utility or other bills)', and 'Other'. A 'Vote' button is at the bottom.
- Community Forum:** A section titled 'Community Forum' with a 'View' button.
- What's Hot:** A section titled 'AssetPlatform.org is now available to the asset building field!' dated April 13, 2010. It provides information about the site's launch and registration details.
- Financial Education Certification - Scholarship Program Available:** A section mentioning that through the Institute for Financial Literacy, an AssetPlatform partner, scholarships are available for service providers working with older adults.

A Platform Raises Everyone to a New Level; It's a Launch Pad

Welcome to AssetPlatform.org

- The Aspen Institute and the Center for the Study of Social Policy joined together to create AssetPlatform.org.
- Target Audiences: Non-profits, advocacy groups, practitioners and policy-makers focused on building assets for low-income families, such as community-based organizations, workforce development programs and EITC campaigns.
- Our Goal: For asset-building organizations to have a meaningful role in the evolving financial services system. AssetPlatform provides a comprehensive set of financial education tools; helping organizations do what they do better – and at greater scale.
- Not reinventing the wheel but creating a community where groups can learn, share resources and better serve clients.

Who We Are

AssetPlatform.org Partners



Services

- ✓ Financial Information
- ✓ Training
- ✓ Tools
- ✓ Consumer-Friendly Financial Products & Services

Categories

- 1) Budgeting
- 2) Savings
- 3) Credit Score
- 4) Debt
- 5) Insurance
- 6) Organizational Resources

AssetPlatform.org ***Site Overview***

Training, Tools and Products
to assist staff in helping
their clients achieve greater
financial stability and security

Budgeting

Keyword Search

Search

ShareThis

Favorites

Coming Soon
Promoting U.S. Savings Bonds at Tax Time -- NEW!
Debt in Focus - NEW!
Saving Rates Sites
Counseling Skills Training

Polls and Ratings

For Results

What is your clients' most common financial goal?

- Get out of debt
- Manage their budgets better
- Buy a home, car or other large purchase
- Build general or emergency savings
- Address immediate financial crisis (e.g. late utility or other bills)
- Other

Vote

Community Forum

Training

[New! A suite of trainings on prepaid debit cards and the CFR card --](#)

[About Prepaid Debit Cards](#) guides counselors in the offering of prepaid debit cards using the fundamental interaction skills. [Learn more.](#)

[Features, Fees and Uses of the CFR Prepaid Debit Card](#) guides counselors through specific features of the CFR card so they can better present the information to their clients. [Learn more.](#)

[How the CFR Card Can Help Your Community](#) provides counselors with real-life scenarios of CFR card applications and uses.

[The CFR Card](#) provides information to organizations about the ways the CFR card can be used to provide both client services and organizational functions. [Learn more.](#)

Avg. rating

Tools

[Quick Assessment](#)
Use this 5-minute questionnaire to quickly identify client needs and priorities. [View Comments](#)
Avg. rating

[Emergency Calculator](#)
Help clients calculate how much they should set aside for an emergency and build a plan for getting there. [View Comments](#)
Avg. rating

[Prepaid Debit Card Overview and Comparison](#)
Learn more about prepaid debit cards, and their advantages and disadvantages for consumers. Compare the features, costs and benefits for some of the most popular cards on the market to see which may be right for your clients. [View Comments](#)
Avg. rating

Products

[CFR Prepaid Debit Card](#)
[Click here](#) to apply for a general-purpose, consumer-friendly prepaid card from the nonprofit Community Financial Resources. [Learn more](#)
NEW!
[View Comments](#)
Avg. rating

Links for staff

www.360financialliteracy.org: Practical information organized around financial decisions at different life stages.
www.nccc.org: A quick online calculator to determine a client's budget needs by state. (Note: does not include all 50 states.)
www.financialmentoring.net: Four easy-to-use modules on reducing debt and increasing savings.
www.cboo.org/etlc2009/calculator: An easy on-line Earned Income Tax Credit estimator.

Links for clients

www.thebeehive.org
From our partner One Economy, information, tools and links, including an on-line budget builder, geared to low and moderate income families.
Avg. rating
www.choosetosave.org
User-friendly tools to help individuals plan and save, plus calculators, brochures and tips.
Avg. rating
www.feedtheorg.org
Easy-to-use tools for individuals, couples

Budgeting

- ❑ Training for counselors on the use of prepaid debit cards to help clients manage their money.
- ❑ Assessment Tool to help determine a family's needs and how to reach their goals.
- ❑ Access to a consumer-friendly prepaid debit card.
- ❑ Links for staff to educational sites and useful links for clients.

Budgeting Training: Prepaid Debit Cards

About PrePaid Debit Cards

AssetPlatform.org

Let's review some key benefits of branded prepaid debit cards:

- Indistinguishable from other credit and debit cards.
- Accepted any place in the card's network.
- Use to make purchases without carrying cash.
- Get cash back with purchases or at ATMs.
- Pay regular bills.



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Sound On ◀

About PrePaid Debit Cards

AssetPlatform.org

Question 1 of 6

1. Anything you can direct deposit to a bank account (payroll, social security payments, tax refunds, etc.) can be direct deposited to a prepaid debit card.

- True
 False

See Answer

Question 4 of 6

4. To get cash from a prepaid debit card, you have to go to an ATM

- True
 False

See Answer

Question 6 of 6

6. All prepaid debit cards are more or less alike in terms of the fees they charge.

- True
 False

See Answer

About PrePaid Debit Cards

AssetPlatform.org

While no one card is the best for all situations, AssetPlatform.org has partnered with Community Financial Resources to offer a prepaid debit card for asset-building programs and their clients. CFR is a nonprofit organization and the CFR card was designed for the low-wage market. It is a consumer friendly card with reasonable fees and useful money-management features. We believe that the CFR card represents a good option for consumers looking for an all-purpose card for spending, paying bills and money management. And you can apply for the card directly on the AssetPlatform.



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Sound On ◀

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Savings

- ❑ Trainings to encourage use of Savings Bonds for tax returns, for starting a Savings Account, and for participating in an IDA Program.
- ❑ Informative check-lists to determine a client's readiness to save and how to help.
- ❑ Useful links for staff and clients.

The screenshot displays the AssetPlatform.org website interface. At the top, the logo "AssetPlatform.org" is accompanied by the tagline "Financial tools to serve your community". A navigation menu includes "Home", "Resources", "Training", "Tools", "Products", and "About Us". A search bar is located in the upper right corner. The main content area is titled "Savings" and is divided into three columns: "Training", "Tools", and "Products".

Training Column:

- New! Suite of four trainings on savings**: Following is a suite of four trainings developed with the assistance of D2D Fund on ways to encourage your clients to save. [Promoting U.S. Savings Bonds](#) teaches counselors how to promote U.S. Savings Bonds at Tax Time using six fundamental interaction skills.
- Promoting Savings Accounts**: helps counselors learn fundamental interaction skills to talk with their clients about savings accounts.
- Promoting Individual Development Accounts**: guides counselors through the fundamental interaction skills needed to talk with their clients about IDAs.
- Offering the Prepaid Debit Card**: provides counselors with practical scenarios on how to talk with clients about using a prepaid debit card to help them save.

Tools Column:

- Savings Success Checklists -- New!**: Use these checklists to help you assess the readiness of your clients to save. Avg. rating:
- Emergency Calculator**: Help clients calculate how much they should set aside for an emergency and build a plan for getting there. [View Comments](#). Avg. rating:

Products Column:

- Savings Bonds at Tax Time**: Click above to learn more about encouraging clients to purchase savings bonds with their tax refunds. For tax preparation programs, the D2D Fund helps with free tools and trainings. [View Comments](#). Avg. rating:
- CFR Prepaid Debit Card**: Click [here](#) to apply for the CFR Prepaid Debit Card, which also can be used to encourage savings. [Learn more](#). Avg. rating:

Links for staff

- www.moneyrates.com: Comparisons for CD's, mortgages, savings, checking, money market accounts and more.
- www.bankrate.com: Comparisons for CD's, mortgages, savings, checking, money market accounts and more. Also calculators on cars, credit cards and debt management.

Links for clients

- www.thebeehive.com: From our partner One Economy, information, tools and links, including an on-line budget builder, geared to low and moderate income families.
- www.americasaves.com: Tips, tools and support to help individuals set goals, develop strategies to reach those goals and start saving.

Additional Features:

- Keyword Search**: A search bar with a "Search" button.
- Share This**: Social media sharing icons for Facebook, Twitter, and LinkedIn.
- Favorites**: A section titled "Coming Soon" with a list of items: "Promoting U.S. Savings Bonds at Tax Time - NEW!", "Debt in Focus - NEW!", "Saving Rates Sites", and "Counseling Skills Training".
- Polls and Ratings**: A poll titled "What is your client's most common financial goal?" with options: "Get out of debt", "Manage their budgets better", "Buy a home, car or other large purchase", "Build general or emergency savings", and "Address immediate financial crisis (e.g. late utility or other bills)".
- Community Forum**: A section for community interaction.

Savings Training: Promoting U.S. Savings Bonds

Promoting U.S. Savings Bonds AssetPlatform.org





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Promoting U.S. Savings Bonds AssetPlatform.org

As the tax preparer, you use the fundamental interaction skills to complete two tasks:

1. Getting Information
2. Giving information



Click the NEXT button.

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Promoting U.S. Savings Bonds AssetPlatform.org

Exercise 2

Based on your observation of the last video what has Bob done correctly to promote savings through US Savings Bonds? Check all answers that apply:

- Asked open ended questions to start the conversation.
- Made sure the client read the Savings Bond brochure and drew attention to it.
- Listened to the customer, repeated back what he had heard and responded to concerns.
- Helped the client see new possibilities for savings, and reassurance that their money will be safe.
- Made it easy for the client to begin saving.
- Provided information about key product features.

[Check Answer](#)

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Debt

- ❑ Training on foreclosure basics and an introduction to medical debt -- Resolving medical debt training forthcoming.
- ❑ An easy-to-use tool to help clients analyze their debt situation and develop a workable action plan.
- ❑ A Foreclosure Counselor Locator.
- ❑ Forthcoming: Access to fairly-priced car loans.

The screenshot displays the AssetPlatform.org website interface. At the top, the logo reads "AssetPlatform.org" with the tagline "Financial tools to serve your community". Navigation tabs include Home, Resources, Training, Tools, Products, and About Us. A "Debt" section is highlighted with a red circle. Below this, there are three columns: Training, Tools, and Products. The Training column lists "Coming Soon! Introduction to Medical Debt" and "Foreclosure Basics". The Tools column lists "Credit Counseling Assessment and Glossary", "Credit Counseling Referral", and "Debt In Focus - NEW!". The Products column lists "Coming Soon! Car Financing Products". On the right side, there is a "Keyword Search" box, social media links, a "Favorites" section with a poll titled "What is your client's most common financial goal?", and a "Community Forum" section. At the bottom, there are "Links for staff" and "Links for clients" sections.

Debt Tool: Debt in Focus

The screenshot shows the 'welcome' page of the debtinfofocus tool. At the top left is the logo 'debtinfofocus'. Below it is the word 'welcome'. The main text explains that the service is brought to you by The Aspen Institute and is free and anonymous. It describes how the tool works: after answering questions about income and debts, a financial analysis is provided, including debt-to-income ratios, payment schedules, and action strategies. A link is provided to see an example. Instructions for first-time and returning users are given. Two large arrows, one green labeled 'start' and one blue labeled 'revisit', are shown. A disclaimer states that the service is completely anonymous and that no personal information is collected or used for identification. The footer includes the copyright year '©2010' and 'THE ASPEN INSTITUTE' logo.

debtinfofocus

welcome

Brought to you by [The Aspen Institute](#), this free and anonymous service will help bring your debt into focus. After answering a few questions about your income and current debts, a simple financial analysis will provide a wealth of information - debt to income ratios, debt payment schedules, and suggested personal action strategies to help keep your finances moving forward. [click here to see an example](#)

First time users, click the "start arrow". Returning users, click the "revisit arrow".

start revisit

This service is **completely anonymous**. We will not ask for your name, social security number, email address, physical address, or any other identifiable information. The information we collect about your income and current debts cannot and will not be used to identify you.

©2010 THE ASPEN INSTITUTE

The screenshot shows the '1. income' page. At the top left is the logo 'debtinfofocus'. At the top right is 'Your Revisit ID: ER43JM49'. Below the logo is a navigation bar with four items: '1. income', '2. debt', '3. questions', and '4. results'. A green arrow points to the '1. income' item. The main heading is '1. income'. The text explains that this is the fun part and recommends entering all sources of household income. It notes that these numbers help calculate how much income is coming in each month and what percentage is spent on debt. A button labeled 'Add New Income' is shown. At the bottom left is a '< back' link with the text 'Take me to the welcome page'. At the bottom right is a 'next >' link with the text 'let's move on to the debt page'. The footer includes '©2010' and 'THE ASPEN INSTITUTE' logo.

debtinfofocus

Your Revisit ID: ER43JM49

1. income 2. debt 3. questions 4. results

1. income

Ok, this is the fun part. We recommend you enter all sources of your household income, such as your primary job, part-time work, freelance, social security, dog walking...well, you get the point.

These income numbers help us calculate just how much you have coming in each month, and what percentage of your overall income is spent on monthly debt. So, sit back, take a deep breath, and hit that **Add New Income** button!

On this page, you'll notice a Revisit ID number at the top right. Please take a moment to write this number down. The information you enter in the following screens is automatically saved as you progress - should you need to leave at any point. When you return you will be asked for this Revisit ID, which will allow you to pick up where you left off or update any information.

Add New Income

< back Take me to the welcome page

next > let's move on to the debt page

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The screenshot shows the '2. debt' page. At the top left is the logo 'debtinfofocus'. At the top right is 'Your Revisit ID: ER43JM49'. Below the logo is a navigation bar with four items: '1. income', '2. debt', '3. questions', and '4. results'. A green arrow points to the '2. debt' item. The main heading is '2. debt'. The text explains that debt is a normal part of life but that it's important to have a realistic plan to keep up with payments. It notes that the tool looks for everything from mortgage or rent to credit cards, auto loans, and student loans. A button labeled 'Add New Debt' is shown. At the bottom left is a '< back' link with the text 'Take me to the income page'. At the bottom right is a 'next >' link with the text 'let's move on to the questions page'. The footer includes '©2010' and 'THE ASPEN INSTITUTE' logo.

debtinfofocus

Your Revisit ID: ER43JM49

1. income 2. debt 3. questions 4. results

2. debt

We owe, we owe, so off to work we go. Sure, debt is a normal part of life, but we'd like to help make sure your level of debt is manageable and you have a realistic plan in place to keep up with monthly payments.

We're looking for everything, from mortgage or rent, to credit cards, auto loans, even student loans. Once we total your debt, you'll be able to easily see what percentage of your income goes toward paying down your debt. Ready to go? Just click the **Add New Debt** button!

Have you written down the Revisit ID number you see at the top right? Please note that you will be asked for this Revisit ID number should you need to leave and come back later to finish the process or update any information.

Add New Debt

< back Take me to the income page

next > let's move on to the questions page

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Credit Score

Training	Tools	Products
	<p>Credit Counseling Assessment and Glossary Confused about counseling options or not sure if a referral to credit counseling is right for your client? Learn more and use this 5-question assessment to find out. View Comments Avg. rating </p> <p>Options for Obtaining Credit Reports and Scores Learn about and compare the various ways to access credit reports and scores for your clients. View Comments Avg. rating </p> <p>Credit Counseling Referral Connect your clients directly with one of 5 credit counseling providers to develop a custom assessment and action plan. View Comments Avg. rating </p>	<p>CBA Access - NEW! From Credit Builders Alliance – for non-profits, credit unions, or government agencies looking to access low-cost, soft inquiry credit reports with FICO scores in support of their asset building work, CBA Access may provide an effective solution.</p> <p>For certified housing and credit counseling agencies, ask CBA for a referral for low-cost tri-merge credit scores and reports (CBA membership is not required, but encouraged). Click here</p> <p>Avg. rating</p>

Links for staff

www.creditprovidersalliance.org. From our partner CBA, see the complete Credit Builders Toolkit, plus for programs that make loans, a streamlined way to report to credit bureaus.

Links for clients

www.thepositive.org. From our partner One Economy, information, tools and links, including an on-line budget builder, geared to low and moderate income families.

www.creditcity.org. A comprehensive overview of credit, understanding credit reports, knowing your score and resolving credit issues.

www.creditkarma.com. Track your credit score and get a free credit score with no hidden costs or obligations.

Keyword Search

Favorites

Coming Soon 

Promoting U.S. Savings Bonds at Tax Time – NEW! 

Debt in Focus - NEW! 

Saving Rates Sinks 

Counseling Skills Training 

Polls and Ratings

Poll Results

What is your client's most common financial goal?

Get out of debt

Manage their budgets better

Buy a home, car or other large purchase

Build general or emergency savings

Address immediate financial crisis (e.g. late utility or other bills)

Other

Community Forum

Credit Score

- ❑ Comparison of options for obtaining credit reports and credit scores.
- ❑ Free credit counseling referrals through a partnership with five national credit counseling providers.
- ❑ Access to low-cost, soft-inquiry credit reports and scores.

Credit Score Product: CBA Access



CBA Access, a service of Credit Builders Alliance

CBA is a growing alliance supporting nonprofits offering financial services and financial education to low-income communities. CBA Access provides nonprofit organizations access to low-cost soft inquiry credit reports with FICO Classic, or other score of your choice, through CBA's partnership with TransUnion.

Nonprofits may use reports and scores for your asset building, financial education and outcome tracking work with clients.

Fees:

CBA Membership - \$100/year
CBA Access Set-up: \$375 (includes CBA and TU set-up fees)

**Let CBA know you are with
AssetPlatform.org to get \$50
discount!**

Report with score begins at just \$5.65, billed directly by TransUnion. Prices are lower in any month you purchase more than 30 reports. No ongoing monthly fees or minimums (compare to \$50-\$80 credit bureau monthly minimums and fees).

Insurance/Safety Net

- ❑ Trainings, tools and products ranging from work supports to long-term financial planning.
- ❑ First offering ~ Tools and information on public supports, including:
 1. An overview on the range of Access to Benefits Tools available
 2. A discussion of state modernization and community outreach efforts
 3. A summary chart of key features of selected Benefit Access Programs

The screenshot displays the AssetPlatform.org website interface. At the top, the logo reads "AssetPlatform.org" with the tagline "Financial tools to serve your community". A navigation bar includes links for Home, Resources, Training, Tools, Products, and About Us. The main content area is titled "Insurance/Safety Net" and is divided into three columns: Training, Tools, and Products. The Tools column features a "Coming Soon" section with a link to a "Quick Guide to Incorporating Public Benefits Into an Asset-Building Strategy" and an "Avg. rating" of 4.5. Below this are sections for "Links for staff" and "Links for clients". On the right side, there is a "Keyword Search" box, social media sharing options, a "Favorites" section with a list of articles like "Promoting U.S. Savings Bonds at Tax Time" and "Saving Rates Sites", a "Polls and Ratings" section with a poll titled "What is your clients' most common financial goal?", and a "Community Forum" section at the bottom.

Organizational Resources

- Information and links to a variety of programs and tools to help organizations more effectively carry out their asset building activities.
- New scholarship opportunity for service providers working with older adults.
- Credit Union Locator: Most comprehensive tool currently available to assist staff in identifying credit union matches.

The screenshot displays the AssetPlatform.org website interface. At the top, the logo reads "AssetPlatform.org" with the tagline "Financial tools to serve your community". Navigation tabs include Home, Resources, Training, Tools, Products, and About Us. A "Keyword Search" box is located in the top right corner. The main content area is titled "Organizational Resources" and is divided into three columns: Training, Tools, and Products. The Training column features a "New!" section for "Scholarships" with a description and a "Coming Soon! Credit Union Locator" section. The Tools column is currently empty. The Products column is also empty. Below the main content, there are sections for "Links for staff" and "Links for clients". The "Links for staff" section includes links to "www.fined.org", "www.financiallit.org", and "www.FITCoPlatform.org". On the right side of the page, there are additional sections: "Favorites" with a list of items like "Promoting U.S. Savings Bonds at Tax Time", "Debt in Focus", "Saving Rates Sites", and "Counseling Skills Training"; "Polls and Ratings" with a poll question "What is your clients' most common financial goal?" and options like "Get out of debt", "Manage their budgets better", etc.; and a "Community Forum" section.

Organizational Resources Training: Scholarship Opportunity



Project **SCREEN**

senior citizens & retiree empowerment education network

A Self-Study Professional Certification Program (Certified Educator in Personal Finance® (CEPF®))

Scholarship Application

APPLICANT INFORMATION

Last Name _____ First Name _____
 Organization Name _____ Organization State _____
 Geographic Area of Service _____ Total # Clients Served Annually _____
 Percentage of Clients who are Senior Citizens _____ Work Phone _____
 Work Email _____ Home Phone _____
 Personal Email _____ Work Address _____
 Home Address _____ Are you a member of AssetPlatform.org? Yes No

PLEASE ANSWER THE FOLLOWING QUESTIONS FOR PROGRAM

I understand the Certified Educator in Personal Finance® (CEPF®) program is a recognized, professional certification, provided to me free of charge by the Institute for Financial Literacy through the generous support of private donors and grant making organizations

YES

I understand that in addition to a proctored exam, "SCREEN" includes:

- Initial assessment and demographic survey
- Post-exam assessment
- Incorporating financial literacy into services
- Sharing experience in a survey

YES

PLEASE CHOOSE ONE OF THE FOLLOWING:

<input type="checkbox"/> Session I	<input type="checkbox"/> Session II	<input type="checkbox"/> Session III
4/1/2010: Application deadline	7/1/2010: Application deadline	10/1/2010: Application deadline
5/1/2010: Notifications sent	8/1/2010: Notifications sent	12/1/2010: Notifications sent
8/1/2010: Exam deadline	11/1/2010: Exam deadline	3/1/2011: Exam deadline
12/1/2010: Program evaluations due	3/1/2011: Program evaluations due	7/1/2011: Program evaluations due

BRIEFLY DESCRIBE ON AN ATTACHED SHEET WHY YOU WOULD LIKE TO PARTICIPATE IN THIS PROGRAM.

Signature _____ Date _____

Please return this application to:

Institute for Financial Literacy

P. O. Box 1842, Portland, ME 04104 • fax (207) 221.3681

tel (207) 221.3612

www.Screen4Seniors.org

SCREEN@FinancialLit.org

Organizational Resources Tool: Credit Union Locator

AssetPlatform.org
Financial tools to serve your community

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[Not a member? Click Here to Register Today](#)

[Home](#) [Resources](#) [Training](#) [Tools](#) [Products](#) [About Us](#)

Credit Union Finder

Affiliation: Address:
 City: State:
 Zip Code: Distance:


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Credit Union Finder

Affiliation: Address:
 City: State:
 Zip Code: Distance:



Results 1 - 4 of 4

SL	Name	Contact	Distance
A	United States Senate FCU Those employed by any of the organizations which comprise our field of membership, as well as members of their families and households.	BH-118 Washington, DC 20510 202-224-2967 www.ussscu.org	1.05 miles
B	United States Senate FCU	441 G Street NW Rm 1100 Washington, DC 20548 202-289-1771 www.ussscu.org	1.37 miles
C	United States Senate FCU Those employed by any of the organizations which comprise our field of membership, as well as members of their families and households.	441 G Street NW Washington, DC 20548 202-289-1771 www.ussscu.org	1.67 miles

Making AssetPlatform.org Work for Your Organization

BUILD STAFF EXPERTISE. Thousands of asset building organizations exist across the country with various levels of expertise among staff. AssetPlatform seeks to create an equal baseline of knowledge among all organizations through access to high quality tools and by helping groups connect with and learn from each other.



BETTER HELP CLIENTS. By allowing multiple organizations to collectively build and share tools and resources in a cost-effective way, AssetPlatform creates stronger organizations that have more information, expertise and resources to pass along to their clients.



BROADCAST YOUR PRODUCTS. In addition to using the existing products on the site, AssetPlatform is also a place for your organization to share your asset development knowledge and offerings with a larger audience. Talk with us about your most successful asset-development tools and products.

Using AssetPlatform.org

Practitioners, Policy-Makers and Press

Tips for Community Organizations, Advocates, Practitioners

1.

Become a member of AssetPlatform.org and share it with your network. Send out a blast email, talk about it at a conference or make it part of a meeting agenda.

2.

Put [AssetPlatform](http://AssetPlatform.org) to work. Plan to try a new tool or training once a week for the next month. Let us know the results.

3.

Explore ways you can make [AssetPlatform](http://AssetPlatform.org) grow. What tools do you rely on that would be helpful for other organizations throughout the country? Become part of the conversation at the site and build a community.

Tips for Policy-Makers

1.

Policy-makers at the local, state and federal level are in an excellent position to support policies that help families keep, protect and grow their assets.

2.

AssetPlatform.org is an good resource for caseworkers in district offices who work directly with families who may need assistance.

3.

Legislative aides who cover financial and social policy issues will also find the broad range of information on AssetPlatform very useful.

Tips for Media

1.

Use AssetPlatform.org as a resource for your work when covering financial issues affecting low-income families. The site includes helpful primers and background information.

2.

Spread the word about how the site can be useful to organizations in your community.

3.

Interview AssetPlatform partners and users to learn how the site is being used on the ground.

**A Platform
Raises
Everyone to
a New Level;
It's a
Launch Pad**

AssetPlatform.org is made possible with the generous support of Living Cities and the Annie E. Casey Foundation.

We are grateful to both funders for their willingness to support innovation in the field.



The Annie E. Casey Foundation *Helping vulnerable kids & families succeed*

AssetPlatform.org

Financial tools to serve your community

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- Resources:** A sidebar with categories: Budgeting, Savings, Debt, Credit Score, Insurance/Safety Net, and Organizational Resources.
- Welcome to AssetPlatform.org:** A central section featuring a photo of three people in a meeting and introductory text about the platform's mission and services.
- Keyword Search:** A search bar with a search button and social media links for Facebook, Twitter, and RSS/Feeds.
- Favorites:** A list of featured content items with titles and dates.
- Polls and Ratings:** A section for user feedback, including a poll question and radio button options.
- Community Forum:** A link to a community forum.

For more information or any questions, please contact Kirsten Moy at The Aspen Institute.

202-736-5807

kirsten.moy@aspeninstitute.org