

# STRENGTHENING RURAL FAMILIES

## AssetPlatform

Fortify Your Financial Toolbox as a *Keep It* and *Grow It* Strategy

### RuFES ReFresher Webinar

Wednesday, June 22, 2011

2:00-3:30 Eastern Time

Brought to you by: Aspen Institute Community Strategies Group

With support from: Annie E. Casey Foundation

# Welcome!



**Elsa Noterman** - Moderator

*Communications and Research Associate*

**Aspen Institute Community Strategies Group**



- This is one in a series of *Rural Family Economic Success (RuFES) Webinars*.
- Open to anyone in the RuFES Action Network, your colleagues and friends – *and to anyone else who wants to participate!*
- As of yesterday, more than 50 people had registered for this Webinar. Some of those are groups!
- Each webinar is recorded and archived, so you – and others – can watch and listen again at your “leisure.”

# Today's Topic

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- The ability to easily access appropriate and useful financial tools can help community-based organizations become more successful in improving the financial security of their clients.
- Current financial constraints on non-profit organizations call for innovative, affordable and effective solutions.
- Organizations that serve rural communities often have different needs and goals than their urban counterparts – differences that may or may not be reflected in available tools and resources.
- **Today's Presentation** will include:
  - A brief overview of the RuFES goals covered by today's webinar
  - An interactive introduction to the AssetPlatform

# Notes on participation...



- **Mute for Now.** The webinar administrator has you all on “mute” for now. This minimizes barking dogs, annoying muzak, and sirens.
- **Clarifying Questions?** See that little **Questions Box** in your Webinar Control panel? During the presentations, if any of the presenters say something that you just don’t get, please type in your question and send it. I will see the questions, and try to find the right time to pose them.
- **More Cosmic Questions?** At given times during the presentation we will have time for questions. In those cases, you can **RAISE YOUR HAND** by clicking on the little hand icon in your control panel. I will see it, and call on people in turn – and you will be magically unmuted when I call on you! (You can also just type a question into the Questions Box.)
- **Polling.** During the webinar there will be a couple times that a poll will appear for you to answer.
- **Technical Problems?** Use the Questions Box if you are having technical problems or want to know how to do something. If it’s really bad, contact Elsa Noterman at [elsa.noterman@aspeninst.org](mailto:elsa.noterman@aspeninst.org) or 202-736-5833.



# Today's Presenters

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## **John Molinaro**

*Co-Director*

***Aspen Institute Community Strategies Group***

*Washington, DC*



## **Kirsten Moy**

*Director, Scale Initiatives*

***Aspen Institute Economic Opportunities Program***

*Washington, DC*



## Also on the Call....

- **Jan Simpson** and **Carolyn Turner** from the *Aspen Institute Economic Opportunities Program*

# Today's Objectives

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- **At the end of today's AssetPlatform Webinar you should:**
  - Have a better understanding of what tools and resources are available on [AssetPlatform.org](https://AssetPlatform.org)
  - Know how to effectively access these tools and resources
  - Provide any feedback on how to make the AssetPlatform more rural-friendly.

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# Brief Introduction to the RuFES Framework

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**John Molinaro**

*Co-Director*

***Aspen Institute Community Strategies Group***

*Washington, DC*



*Built on Three Family-Focused Goals*

# The RuFES Framework



## Earn It

- *Working families earn a living that allows them to survive, thrive and raise their children in their community.*



## Keep It

- *Working families have access to and make good choices that safeguard their family income and lower their cost of living, forging stable and predictable financial lives.*



## Grow It

- *Working families accumulate and maintain assets that gain value and advance family and community prosperity over time.*

# Today's Framework Focus



## Keep It

- *Working families have access to and make good choices that safeguard their family income and lower their cost of living, forging stable and predictable financial lives.*



## Grow It

- *Working families accumulate and maintain assets that gain value and advance family and community prosperity over time.*

***The AssetPlatform offers tools and resources that support FAMILY-FOCUSED GOALS related to:***

- *Establishing Financial Health*
- *Protecting Income and Decreasing Costs*
- *Accumulating Family Assets and Building Wealth*

# AssetPlatform and RuFES

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- The Annie E. Casey Foundation has helped to support the AssetPlatform – just as AECF supports RuFES!
- Aspen Institute Community Strategies Group has been working with the developers of AssetPlatform to help make it more applicable to rural audiences

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# AssetPlatform.org

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**Kirsten Moy**

*Director, Scale Initiatives*

***Aspen Institute Economic Opportunities Program***

*Washington, DC*



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# What is AssetPlatform.org?

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- **AssetPlatform.org** is a new resource for staff at nonprofit organizations that provides financial education, coaching and asset development services.
- **AssetPlatform** delivers high quality, affordable and easily accessible products and services to the desktops of front-line staff, so they can more effectively serve their communities, including:
  - ✓ *Training, calculators, assessment tools, consumer-friendly financial products and links to experts*

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# How is AssetPlatform.org organized?

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- **AssetPlatform.org** is organized around six primary categories of resources:
  1. *Budgeting*
  2. *Savings*
  3. *Credit Score*
  4. *Debt*
  5. *Insurance*
  6. *Organizational Resources*

Each category contains a variety of relevant training, tools and products.

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# What is the mission of AssetPlatform.org?

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*AssetPlatform seeks to fulfill several goals, including:*

- To raise the quality, efficiency, capacity and impact of the asset development and related fields by supporting organizations to do what they do better and at greater scale.
- To add value to local programs in a way that supports attainment of their own missions
- To act as a platform where multiple organizations collectively build and share tools and resources in a cost-effective way

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# Navigating AssetPlatform.org?

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Today, we will navigate [AssetPlatform.org](https://AssetPlatform.org) together to learn how to easily access the tools and resources on the platform that are most valuable to your work.

When asked through the registration process to identify the issues that are most important for the people you work with in your community, the majority of the webinar participants identified:

- Family Budgeting Systems Online
- Emergency Savings
- Savings Accounts
- Individual Development Accounts

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# Let's take a closer look at [AssetPlatform.org](https://AssetPlatform.org)!

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## Today's Plan:

- Savings and Budget Sections
- Q&A
- Credit and Debt Sections
- Q&A
- And New Online Resources related to Family Budgeting

# Contact



**Kirsten Moy**



[Kirsten.moy@aspeninstitute.org](mailto:Kirsten.moy@aspeninstitute.org)

# STRENGTHENING RURAL FAMILIES

**Questions?**



# STRENGTHENING RURAL FAMILIES

Webinar recording and Handouts at:

**We will send you the link!**

Please fill out a brief evaluation at  
<http://tinyurl.com/assetplatform>  
to help us make future RuFES  
webinars better!!

