



# FINANCIAL WELLNESS RESOURCE GUIDE

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State Diversity, Equity, and Inclusion (DEI) initiatives focused on improving the financial literacy of underserved populations within the insurance sector



# ABOUT The NAIC

The National Association of Insurance Commissioners (NAIC) provides expertise, data, and analysis for insurance commissioners to effectively regulate the industry and protect consumers. Founded in 1871, the U.S. standard-setting organization is governed by the chief insurance regulators from the 50 state-

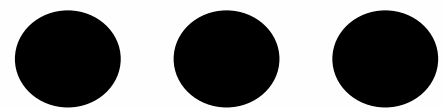
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# OUR APPROACH

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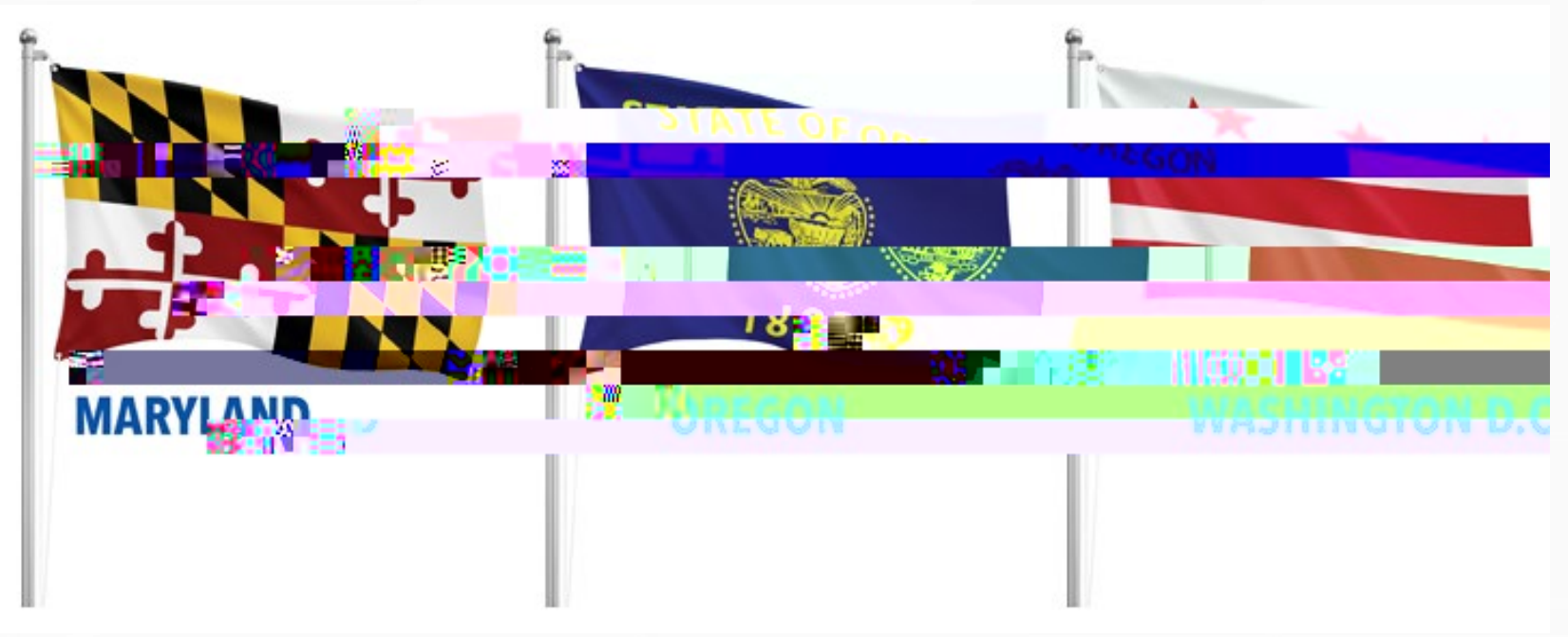
The Life Workstream, in collaboration with the NAIC State Diversity Leaders, asked about states' financial literacy



# CURRENT ACTIVE STATES

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We are highlighting three initiatives, based on survey feedback. The Life Workstream welcomes additional information on state financial literacy initiatives.



# PARTICIPATING STATES / JURISDICTIONS

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Maryland  
Oregon  
Washington, D.C.



# FINANCIAL WELLNESS PLAN

## MARYLAND

Maryland's Insurance Administration's (MIA) goal is to help consumers understand the importance of insurance. The information is provided through multi-lingual presentations (in-person and virtual); events (MIA set up tables at various locations including libraries, food banks,



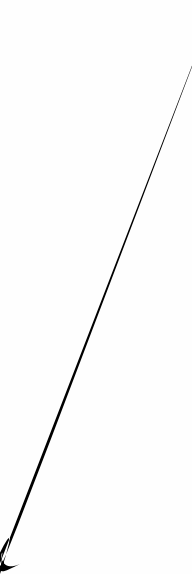


# FINANCIAL WELLNESS PLAN

## District of Columbia

The DC Department of Insurance, Securities, and Banking (DISB) provides diverse programs for women, youth, immigrants, justice-involved individuals, military/veterans, and seniors or disabled individuals to meet specific financial needs covering budgeting, credit management, home buying, retirement planning, and wealth building.

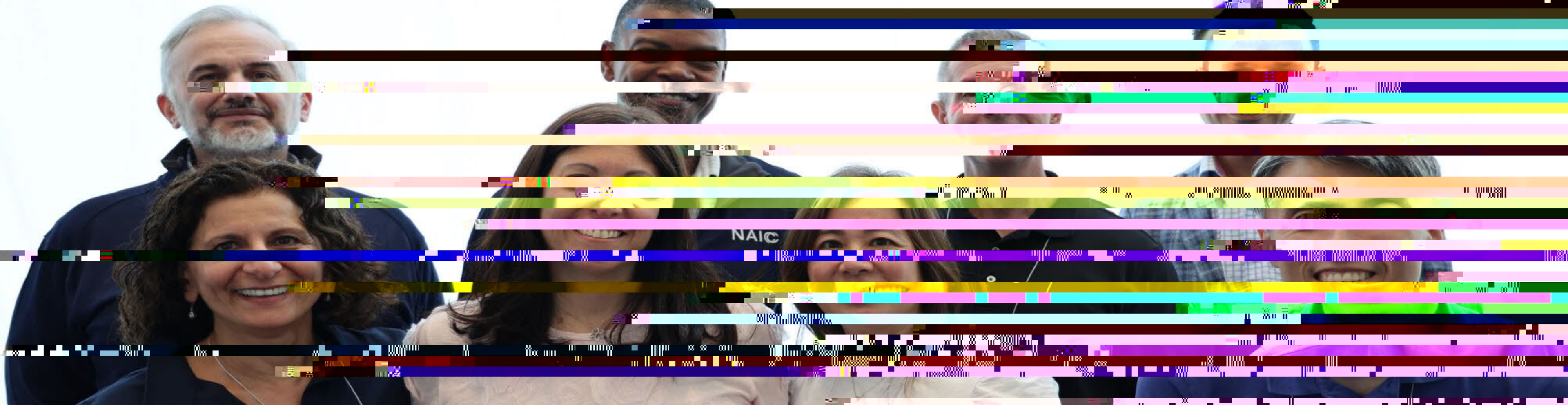
The Consumer Analysis Division (CAD) specializes in life insurance flood insurance, estate planning for seniors, and addresses financial needs for seniors and disabled individuals.











# THANK YOU

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If you would like to add your state's information regarding how you provide insurance information specifically to underserved populations, please email us.

# Additional Resources

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## **Consumer Financial Protection Bureau** (CFPB)

- Website includes educational resources focused on responsible use of financial services.

## **Federal Deposit Insurance Corporation** (FDIC)

- Website includes resource [Money Smart](#), which is a financial education program for researchers, educators, and youth interested in financial topics.

## **Federal Financial Literacy and Education Commission**

- Website [MyMoney.gov](#) includes resources for researchers, educators, and youth interested in financial topics

## **FINRA Financial Industry Regulatory Authority**

- [FINRA Investor Education Foundation](#) provides educational programs and research to help consumers achieve their financial goals.

## **American Institute of CPAs**

- Website [360 Degrees of Financial Literacy](#) provides a free program to help consumers understand their personal finances.

## **Champlain College**

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