

TIPS TO CONDUCT OUTREACH: HOW TO SHARE THE “ASK AND CHECK” MESSAGE

The FINRA Investor Education Foundation’s Outsmarting Investment Fraud program seeks to reduce the incidence of investment fraud by teaching investors how to “ask and check.” The following is a list of suggested outreach strategies to share this message in your community.

Also included in this toolkit and on the www.SaveAndInvest.org Web site are materials that can help you conduct outreach. These materials can be found in the **Outreach Tools and Materials** section of this toolkit.

- ❑ **Hold a workshop or event.** One of the best ways to share the “ask and check” message is through a workshop or event that draws attention and encourages individuals to take action. Using the *Outsmarting Investment Fraud* curriculum or the “Tricks of the Trade: Outsmarting Investment Fraud” DVD as the centerpiece, a workshop or event can take place with a small group of friends or a large gathering of community members—the size and format are up to you. Workshop and event ideas can be found in the **Planning an Investor Protection Workshop or Event** section of this toolkit.
- ❑ **Work with local civic and community organizations.** Rotary and Lions Clubs; libraries; Senior Centers and Councils on Aging; and volunteer-focused organizations, such as the Retired Senior Volunteer Program (RSVP), are good places to reach out to investors ages 55 and older. Contact community coordinators about posting fliers on the bulletin board; distributing “Fighting Fraud 101” brochures; including information in newsletters; and alerting their patrons about upcoming investor protection workshops or events. Consider working with the organizations to present the *Outsmarting Investment Fraud* curriculum or the “Tricks of the Trade: Outsmarting Investment Fraud” DVD to their members. See **Planning an Investor Protection Workshop or Event** for more ideas.
- ❑ **Look for opportunities with adult and continuing education classes.** The *Outsmarting Investment Fraud* curriculum is a great tool for those teaching financial or other adult education classes. Talk to continuing education professors or students about the possibility of including “investor protection” as a topic for a regularly scheduled class.
- ❑ **Reach out to businesses.** Employers can serve as powerful spokespersons in telling their employees about upcoming investor protection events and resources available at www.SaveAndInvest.org. Contact local businesses, colleges, hospitals and business associations and ask if they would be willing to distribute the “Fighting Fraud 101” brochure or hang an event flier. Set up a meeting with the person who manages benefits or professional development and be prepared to talk about the campaign and offer to hold a curriculum presentation for employees.
- ❑ **Contact your local library.** The library is a great place to reach members of the community. Check to see if the library will distribute “Fighting Fraud 101” brochures or hang event fliers on the community bulletin board. Set up a meeting with the community

director and be prepared to talk about the campaign. Offer to hold an investor protection workshop or series of workshops for library patrons. Ask if they would be willing to include “Tricks of the Trade: Outsmarting Investment Fraud” in their movie collection.

- ❑ **Engage faith-based organizations.** Contact faith leaders and their congregants and ask them to include information about upcoming investor protection workshops or events in their bulletins and programs. Interfaith groups in your community are a good way to connect with leaders of different faiths. Some may request that you obtain approval from a faith organization’s city-wide or regional office. Churches, synagogues, temples, mosques and other places of worship are also places to consider for a curriculum workshop.
- ❑ **Include information in your organization’s communications materials.** Included in this Campaign Toolkit is a template newsletter article that you can tailor to your organization and include in listservs, e-newsletters or print publications. It can be found in the **Outreach Tools and Materials** section of this toolkit.
- ❑ **Promote the SaveAndInvest.org Web site.** Free online tools and information are available at **www.SaveAndInvest.org**, including a Fraud Risk Meter, Scam Meter and FINRA BrokerCheck. If you work or volunteer for an organization that has a Web site, consider including a link to **www.SaveAndInvest.org**.
- ❑ **Distribute materials at community festivals or fairs.** Consider setting up a booth at local events where many community members will be present. Distribute “Fighting Fraud 101” brochures and contact the FINRA Investor Education Foundation to obtain copies of the “Tricks of the Trade: Outsmarting Investment Fraud” DVD and other educational materials. See the **Outreach Tools and Materials** section of this toolkit to view available materials and find an order form.
- ❑ **Establish an “Investor Protection” day, week or month.** Make investor protection a regular area of focus for your organization or community by establishing a regular day, week or month for investor protection workshops and events to take place. By establishing a regular time of year for promotion, you can encourage additional organizations to plan and take part.
- ❑ **Engage the media.** If you are planning an investor protection workshop or event, let your local television, newspapers and radio stations know. Invite them to attend and encourage them to write about the issue. When calling a news reporter, be prepared to explain why investor protection is an important issue for every member of the community. Tips for engaging the media can be found in the **Outreach Tools and Materials** section of this toolkit.



- ❑ **Pitch campaign public service announcements (PSAs).** Television and print PSAs and radio reader scripts have been developed to promote the “ask and check” message and to encourage individuals to visit www.SaveAndInvest.org. Tips on how to pitch these PSAs in your community can be found on the **Outreach Tools and Materials** section of this toolkit.

- ❑ **Partners are everywhere.** The best way to share the “ask and check” message is to partner with organizations that serve our audience of investors ages 55 to 65. Consider reaching out to the kinds of organizations listed below and asking them to help distribute educational materials or even host an *Outsmarting Investment Fraud* curriculum workshop for their members:
 - ✓ Book Clubs
 - ✓ Bridge Clubs
 - ✓ Chambers of Commerce
 - ✓ Community Centers
 - ✓ Community Colleges
 - ✓ Community Sustainable Agriculture Cooperatives and other agricultural associations
 - ✓ Continuing Education Programs
 - ✓ Councils on Aging
 - ✓ Golf Clubs
 - ✓ Kiwanis Clubs
 - ✓ Law Enforcement Agencies
 - ✓ Libraries
 - ✓ Lions Clubs
 - ✓ Local Churches/Places of Worship
 - ✓ Post Offices
 - ✓ Recreation Centers
 - ✓ Retired Senior Volunteer Program (RSVP)
 - ✓ Retired Teachers Associations
 - ✓ Retirement Communities
 - ✓ Rotary Clubs
 - ✓ Senior Centers
 - ✓ Social Clubs
 - ✓ Unions