



Guidelines for participation in “Financial Education Month” - October 2021 and procedures for granting of use of the official logo of the initiative

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Financial Education Month www.quellocheconta.gov.it

The Committee on the Planning and Coordination of Financial Education Activities promotes from 1 to 31 October 2021 the fourth edition of “Financial Education Month”, with information and awareness-raising activities and events on financial, insurance and social security education.

Why participate in “Financial Education Month”?

Participation in “Financial Education Month” allows you to take part in the major event on financial, insurance and social security education of Italy, now in its fourth edition.

Partners who participate are allowed to use the specific logo that distinguishes the annual edition of the “Month” and to be included in the official calendar of the event on the www.quellocheconta.gov.it portal, taking advantage of various promotion activities at national and local level, designed by the Committee for all the events in the calendar.

Who can participate in “Financial Education Month”?

“Financial Education Month” is a project open to:

- Central and peripheral public administrations;
- Non-profit institutions, such as trade associations and professional associations, foundations, schools, universities and research centres, non-

governmental organisations (NGO), consumer associations, cultural associations, cultural association, teacher/parent associations;

- Private organisations and companies, including operators in the insurance, social security and banking-financial sectors, excluding individuals, individual professionals and sole proprietorships, which propose initiatives in line with the participation criteria indicated below.

To maximise the effectiveness of the initiatives and to avoid duplication of efforts, as well as to ensure an adequate dissemination of the activities throughout the national territory, the Committee may intervene to better coordinate the initiatives of the applicants, facilitating synergies and collaborations between them, as well as supporting their communication in an integrated and coherent way.

Which initiatives are eligible for inclusion in the official calendar of “Financial Education Month”?

Eligible for applications are events held from 1 to 31 October 2021 that, in response to these Guidelines, are considered by the Committee to be of institutional importance, of certain social utility and in line with the National Strategy for financial, insurance and social security education and with the operational Programme available on the www.quellocheconta.gov.it website.

The promoters of the initiatives will be able to submit their applications from 1 July to 30 September 2021, using the appropriate online form available on the www.quellocheconta.gov.it website.

The proposed initiatives, presented independently or in collaboration with other applicants, must be consistent with the indications and contents set out in the “Guidelines for the development of financial education skills in schools” and in the “Guidelines for the implementation of financial

education programmes for adults” available on the www.quellocheconta.gov.it website in the About us section.

Initiatives may be, for example:

- training programmes dedicated to specific segments of the population: young people, women, the elderly, small entrepreneurs, workers, migrants;
- conferences, seminars, events, days/weeks for financial, insurance and social security education or other awareness-raising projects also involving cross-cutting issues, such as sustainability in the financial field and digitalisation;
- cultural initiatives (e.g., shows, guided tours, thematic exhibitions, etc.) to raise awareness on the issues of financial, social security and insurance education.

Also in light of the context deriving from the current health emergency, in addition to in-person events that comply with the norms in force on health safety being eligible, remote events are also eligible (in streaming or through the various video-conference platforms available on the market), allowing them to be followed via Internet, through the most recent browsers, through platforms that don't require subscription or payment services.

Themes at the centre of the 2021 edition

For the 2021 edition, applicants are invited to organise initiatives aimed at increasing the financial, insurance and social security skills helpful for better dealing with personal and family financial choices, particular attention will be paid to the importance of financial planning in a long-term perspective.

“Financial Education Month: take care of your future” will be the theme of this fourth edition.

The goal of the initiative will be therefore that of understanding how taking of one's finances day after day, but with the gaze also directed toward tomorrow, making conscious financial choices and understanding how to deal with any unexpected events, are the keys to a serene future and greater financial well-being.

Social Security Education Week - 18-24 October 2021

To stimulate attention and the debate on social security themes - particularly important in the context of financial planning characterised by a long-term perspective - also for the 2021 edition of “Financial Education Month”, Social Security Education Week has been confirmed.

The initiative, in its second edition and destined to become an annual event, was born with the aim of increasing the social security culture of citizens, promoting a better understanding of the functioning of the Italian social security system, both mandatory and complementary, and of increasing awareness of the need for savings planning for pension purposes.

Interested applicants are invited to plan events and initiatives on the themes of welfare in the third week of October, on the occasion of Social Security Education Week.

The applicant’s responsibilities in organising events

The applicant must be able to organise and promote the event independently, with its own resources and using its own means, including the platforms and IT tools necessary for the use of online events. The applicant undertakes, under its sole responsibility, to carry out initiatives in

accordance with current legislation, including - by way of example - rules on the processing of personal data and provisions relating to prevention and public health protection provided by national and local authorities or by the employer who promotes the initiative.

Participation criteria

The initiatives recommended by the applicants must follow the following criteria:

1. free of charge and without conflicts of interest

In order to participate in “Financial Education Month” the proposed initiatives:

- must not be commercial in any way and must not pursue promotional or advertising purposes;

- must not provide for charges to be borne by the final recipients or by the Committee, not even in relation to the purchase of licenses or software in the case of online events.

The content and format of the material provided to participants during the “Financial Education Month” initiatives must guarantee objectivity, that is, they must not be attributable to any commercial purposes of the proponents. In particular, the information materials related to the initiative and disseminated to participants must not advertise paid products or services. The visibility of any brand, logo or reference to the applicants, even if permitted, must be reduced to the minimum.

2. quality of the resources and trainers

The proposed financial, insurance and social security education materials must be developed in the interest of the recipients and must be:

- provided to participants free of charge;
- suitable for the social, economic, cultural and linguistic context in which they will be disseminated and appropriate to the knowledge level of the recipients;
- accurate and up-to-date;
- easily accessible also to people with disabilities;
- developed without the use of technical terms and jargon, unless these are appropriate for the intended audience.

The speakers/trainers/trainers involved in the initiatives must:

- have proven knowledge of the topics covered;
- have teaching skills adequate to address the target audience, in particular to children and young people (inside or outside schools);
- have teaching skills adequate to address the target audience, in particular to children and young people (inside or outside schools);
- in the event of initiatives carried out in cooperation with schools, work under the supervision of teaching staff, also in the case of online events.

3. how to submit proposals for participation and inclusion in the “Financial Education Month” calendar

All proposals to participate in “Financial Education Month” must be received through the appropriate online form available on the www.quellocheconta.gov.it website from 1 July to 30 September 2021. Once approved by the Committee, the initiative will be published in the calendar of the “Month”.

To take advantage of the promotional activities of the Committee, applicants are invited to submit applications as soon as possible, but no later than the deadline indicated. This will make it possible to include all the approved activities in the official calendar of the “Month” in a timely manner and give adequate dissemination and publicity to all the events.

For increased visibility of the initiative in the calendar of the “Month”, the applicant is invited to attach to its application also an image that refers to the event it intends to propose. The image must be in 800 x 500 pixels format and of adequate graphic quality (examples of images are available in the official calendar of the 2020 event on the www.quellocheconta.gov.it portal); the image must be sent by the applicant through the appropriate online form; images of different sizes from those requested and/or not correctly viewable will be replaced by ad hoc images produced by the Committee for the various target audiences. It is recommended to put the logo of the “Month” in the image of promotion of the event attached to the application.

4. granting of use of the logo

The official logo of the initiative - available on the www.quellocheconta.gov.it portal in the Financial Education Month section starting from 1 July - can be used for promotional events solely and exclusively following the communication about the admission of the initiative to the 2021 of “Financial Education Month”. The logo of the event cannot be modified and it can only be used by the authorised party and strictly for the period and the activity/event in the “Financial Education Month 2021” calendar.

The logo can be used together with the logos of the applicant, but it must be graphically independent, not confusing and not associated with any other logo.

The logos of the event's participants remain the property of their legitimate owners, who grant the right of use to the Committee for the purposes of sponsorship also successively at the end of the event and, in particular, for the activity of sponsorship and promotion of the edition of the “Financial Education Month”.

The Committee reserves the right to monitor the materials of “Financial Education Month” and the websites of the applicants, reminding them of the correct use of the logo if required. The reproduction and use of the logo in ways that differ from what is prescribed involves the immediate cancellation from the official calendar of the “Month”.

Contacts

For any requests for information or clarifications, for example on the activities to propose, on the criteria for participation or on the method of granting of use of the logo and inserting the initiatives in the “Financial Education Month” Calendar, you can contact the Committee at this address Mese.Edufin@regint.it.