

Suggested Additional Reading

These articles were chosen from the Financial Libraries in the sites comprising the Financial Education Center. They were selected to provide additional insights into the financial issues commonly faced by consumers and to highlight topics that were likely to create a dialogue with a consumer that could lead to cross-sales opportunities and additional revenues.

Article	Location in Library of Sites within the Financial Education Center	Product or Service Cross Selling Opportunities
Developing and Using a Wise Borrowing Strategy	Financial Tool Kit Library – General	Credit cards, loans home equity loans and mortgages.
Use Automatic Savings Programs to Reach Your Financial Goals	Financial Tool Kit Library – General	Direct deposit and automatic savings plan pages.
Choosing the Right Accounts for Your Cash	Financial Tool Kit Library – General	Deposit accounts, checking accounts and CDs.
Preparing for Major Financial Events	Financial Tool Kit Library – General	Home equity loans, IRAs, investments and financial planning.
Accumulating a Down Payment on a Home	Financial Tool Kit Library – Home and Residence	Mortgages, automatic savings plans
Evaluating Mortgage Types	Financial Tool Kit Library – Home and Residence	Mortgages
Tax Implications of Home Ownership	Financial Tool Kit Library – Home and Residence	Mortgages, home equity loans
Have an Insurance Strategy	Financial Tool Kit Library – Insurance	Insurance, trust services, investments and financial planning.
Asset Allocation	Financial Tool Kit Library – Investing	Investments, financial planning and CDs.
Financial Market Indicators	Financial Tool Kit Library – Investing	Investments and financial planning.
Investing in Mutual Funds	Financial Tool Kit Library – Investing	Mutual funds, investing and financial planning
Four Components of a Financially Secure Retirement	Financial Tool Kit Library – Retirement	IRAs, investments, financial planning and trust services
IRA or Roth IRA?	Financial Tool Kit Library – Retirement	IRAs, investments, financial planning and trust services.
Add \$100,000 to Your Retirement Savings	Financial Tool Kit Library – Retirement	Automatic savings programs, IRAs, investments, financial planning and trust services
Understanding the Social Security System	Financial Tool Kit Library – Retirement	IRAs and financial planning.
Reviewing Your Options for a Retirement Plan Distribution	Financial Tool Kit Library – Retirement	IRAs, investments, financial planning and trust services
Tax Implications of Financial Decisions	Financial Tool Kit Library – Income Taxes and Estate Planning	Investments, financial planning and trust services
The Basics of Estate Planning	Financial Tool Kit Library – Income Taxes and Estate Planning	Trust services
Custodial Accounts for Children	Financial Tool Kit Library – Issues Facing Parents	Deposit accounts, investments, trust services and financial planning
College Funding Options	Financial Tool Kit Library – Issues Facing Parents	Deposit accounts, investments and financial planning
Develop Good Financial Habits	Financial Foundation Center – Front Page	Direct deposit, automatic savings plans, deposit accounts, ATMs
Build a Solid Credit History	Financial Foundation Center – Front Page	Credit cards, loans

First Financial Relationship	Financial Foundation Center – Front Page	ATMs, deposit accounts, direct deposit
Defining a Good Financial Life	Financial Foundation Center – Front Page	Deposit accounts, direct deposit, lines of credit, mortgages
Beginning to Think About Retirement	Financial Foundation Center – Front Page	IRAs, automatic savings plans, investments, financial planning
Building Your Financial Literacy	Financial Foundation Center – Front Page	
Starting on the Road to Financial Security	Financial Foundation Center Library – General	Deposit accounts, direct deposit, credit cards, loans
Considerations When Starting a Business	Small Business Resource Center – Front Page	Business banking, loans, deposit accounts
The Art and Science of Generating Referrals	Small Business Resource Center Library – Marketing	Business Banking
Reviewing Your Company's Retirement Plan Options	Small Business Resource Center – Retirement Planning	Business banking, investments and trust services

Additional Notes