

Exhibit B

Ryan, Mary Jo

From: Ryan, Mary Jo
Sent: Monday, November 03, 2014 9:54 AM
To: McManus, JoAnn
Subject: FW: FINRA training news release templates
Attachments: NewsRIsFinEdTngYoungAdultTemplate.doc; NewsRIsFinEdTngTemplate.doc; NewsRIsFinEdTngRetireeTemplate.doc; NewsRIsFinEdTngPreRetireeTemplate.doc

TO: Libraries in the Smart Investing @ your library® Builds Nebraska Communities Project

Hi All. We did get these templates for new releases approved by FINRA. They are slightly different—specialized according to the target audience that you have selected. There is a fourth release—a general audience release. Please use that one ONLY after you have done your target marketing and use it as a reminder release right before an event...you can then make it clear that all are welcome and that specialized online curriculum is available geared to the three specific life situations ... Young Adult, Pre-retiree, and Retiree. Of course these releases should be customized to suit your community and library, but please don't remove any of the credit language. Please send copies of your marketing plans when they are put together and also share any copies of promotional coverage and photos of your displays. Thanks so much, mjr

Mary Jo Ryan, Communications Coordinator
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nlc.nebraska.gov

"If we couldn't laugh, we would all go insane," Jimmy Buffett.

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Financial Literacy Training Sample Press Release—target young adults (age 20-40)

DATE: Send to local media in advance of Kick-off Activity

Note: If using this to publicize the date of your Kick-off and Wrap-up Activities, please be sure to include the date and time of the activities in the headline and in the body of the release AND be sure to mention the drawing for the iPod Shuffle—noting that to be eligible for that drawing, participants must attend the Kick-off and Wrap-up events and go through the online curriculum.

FOR IMMEDIATE RELEASE

CONTACT: [Insert name, phone number, email]

[NAME OF YOUR LIBRARY] Offers New Financial Education Materials and Training [with a Kick-off Event on _____ date, if date is set]

Where will you find money for college or money to buy a home? [YOUR LIBRARY] has resources to help young people in [YOUR COMMUNITY] find answers. The library is offering books, DVDs, in-library events, and online curriculum, [add other activities if your library is doing additional activities and add: **with a Kick-off Event on _____ date, if date is set**] to help people make better decisions about their money by taking advantage of free, unbiased resources offered at the library.

[If the Kick-off is scheduled add this paragraph] A Kick-Off Event to launch the library training is scheduled at the [LIBRARY NAME] on [DATE AND TIME]. Advance registration is recommended by stopping by or contacting the library at [PHONE NUMBER and Email]. Participants who attend both the Kick-Off and Wrap-Up events and participate in the online curriculum will be eligible for the drawing of an iPod Shuffle. [add “and other prizes” if your library is gathering those].

NOTE: All libraries except Grand Island, Central City, and Lexington should include the information about Cooperative Extension. Erin and Kathy are not/no longer associated with them—so Grand Island, Central City, and Lexington can just list local partners.

[YOUR LIBRARY] and community partners, including UNL Cooperative Extension [**and other local partners you have collaborated with**], are promoting free resources designed especially to help young people better manage money, credit, investments, and debt— and learn to avoid identity theft, protect their privacy, and steer clear of financial scams and fraud.

“**NAME of LIBRARY** is a now a go-to resource in our community for unbiased information about money and investing. Our aim is to help people make well-informed financial decisions for themselves and their families.” said [title and name of your spokesperson, YOUR LIBRARY]. “For many families, money is still tight. More people are turning to us to learn about budgeting, getting out of debt and planning for college or retirement. We’ve got quality information and are eager to help.”

For more information visit [YOUR LIBRARY] at [YOUR LIBRARY'S ADDRESS] or check out our website and facebook page: [YOUR LIBRARY'S URL] and [YOUR LIBRARY'S FACEBOOK ADDRESS].

This financial education effort is supported in part by a grant from Smart investing @ your library®, a partnership between the American Library Association and the FINRA Investor Education Foundation. The *Smart Investing @ your library® Builds Nebraska Communities* program is coordinated in Nebraska by the Nebraska Library Commission and the Northeast Library System.

The Reference and User Services Association, a division of the American Library Association, is the foremost organization of reference and information professionals who make the connections between people and the information sources, services and collection materials they need. Established in 1876, the American Library Association is the oldest and largest library association in the world. It strives to provide leadership for the development, promotion and improvement of library and information services and the profession of librarianship in order to enhance learning and ensure access to information for all. For more information, visit www.ala.org.

FINRA, the Financial Industry Regulatory Authority, is the largest independent regulator for all securities firms doing business in the United States. FINRA is dedicated to investor protection and market integrity through effective and efficient regulation and complementary compliance and technology-based services. FINRA touches virtually every aspect of the securities business—from registering and educating all industry participants to examining securities firms, writing rules, enforcing those rules and the federal securities laws, informing and educating the investing public, providing trade reporting and other industry utilities, and administering the largest dispute resolution forum for investors and firms. For more information, visit www.finra.org.

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Financial Literacy Training Sample Press Release

DATE: Send to local media in advance of Kick-off Activity

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FOR IMMEDIATE RELEASE

CONTACT: [Insert name, phone number, email]

[NAME OF YOUR LIBRARY] Offers New Financial Education Materials and Training [with a Kick-off Event on _____ date, if date is set]

Where will you find money for college? ...money to buy a home? ...money for retirement? [YOUR LIBRARY] has resources to help people in [YOUR COMMUNITY] find answers. The library is offering books, DVDs, in-library events, and online curriculum, [add other activities if your library is doing additional activities and add: **with a Kick-off Event on _____ date, if date is set**] to help people make better decisions about their money by taking advantage of free, unbiased resources offered at the library.

[If the Kick-off is scheduled add this paragraph] A Kick-Off Event to launch the library training is scheduled at the [LIBRARY NAME] on [DATE AND TIME]. Advance registration is recommended by stopping by or contacting the library at [PHONE NUMBER and Email]. Participants who attend both the Kick-Off and Wrap-Up events and participate in the online curriculum will be eligible for the drawing of an iPod Shuffle. [add “and other prizes” if your library is gathering those].

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[YOUR LIBRARY] and community partners, including UNL Cooperative Extension [**and other local partners you have collaborated with**], are promoting free resources to help consumers better manage money, credit, investments, and debt— and learn to avoid identity theft, protect their privacy, and steer clear of financial scams and fraud.

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For more information visit [YOUR LIBRARY] at [YOUR LIBRARY'S ADDRESS] or check out our website and facebook page: [YOUR LIBRARY'S URL] and [YOUR LIBRARY'S FACEBOOK ADDRESS].

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Financial Literacy Training Sample Press Release—**Retirees**

DATE: Send to local media in advance of Kick-off Activity

Note: If using this to publicize the date of your Kick-off and Wrap-up Activities, please be sure to include the date and time of the activities in the headline and in the body of the release AND be sure to mention the drawing for the iPod Shuffle—noting that to be eligible for that drawing, participants must attend the Kick-off and Wrap-up events and go through the online curriculum.

CONTACT: [Insert name, phone number, email]

FOR IMMEDIATE RELEASE

[NAME OF YOUR LIBRARY] Offers New Financial Education Materials and Training [with a Kick-off Event on _____ date, if date is set]

How will you make your money last in retirement? [YOUR LIBRARY] has resources to help retirees in [YOUR COMMUNITY] find answers. The library is offering books, DVDs, in-library events, and online curriculum, [add other activities if your library is doing additional activities and add: **with a Kick-off Event on _____ date, if date is set**] to help retirees make better decisions about their money and make their money last by taking advantage of free, unbiased resources offered at the library.

[If the Kick-off is scheduled add this paragraph] A Kick-Off Event to launch the library training is scheduled at the [LIBRARY NAME] on [DATE AND TIME]. Advance registration is recommended by stopping by or contacting the library at [PHONE NUMBER and Email]. Participants who attend both the Kick-Off and Wrap-Up events and participate in the online curriculum will be eligible for the drawing of an iPod Shuffle. [add “and other prizes” if your library is gathering those].

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[YOUR LIBRARY] and community partners, including UNL Cooperative Extension [**and other local partners you have collaborated with**], are promoting free resources designed especially to help retirees better manage money, credit, investments, and debt—and learn to avoid identity theft, protect their privacy, and steer clear of financial scams and fraud.

“**NAME of LIBRARY** is a now a go-to resource in our community for unbiased information about money and investing. Our aim is to help people make well-informed financial decisions for themselves and their families.” said [title and name of your spokesperson, YOUR LIBRARY]. “For many families, money is still tight. More people are turning to us to learn about budgeting, getting out of debt and planning for college or retirement. We’ve got quality information and are eager to help.”

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Financial Literacy Training Sample Press Release—**Baby Boomers/Pre-Retirees**

DATE: Send to local media in advance of Kick-off Activity

Note: If using this to publicize the date of your Kick-off and Wrap-up Activities, please be sure to include the date and time of the activities in the headline and in the body of the release AND be sure to mention the drawing for the iPod Shuffle—noting that to be eligible for that drawing, participants must attend the Kick-off and Wrap-up events and go through the online curriculum.

FOR IMMEDIATE RELEASE

CONTACT: [Insert name, phone number, email]

[NAME OF YOUR LIBRARY] Offers New Retirement Planning Financial Education Materials and Training [with a Kick-off Event on _____ date, if date is set]

Where will you find money for retirement? [YOUR LIBRARY] has resources to help Baby Boomers in [YOUR COMMUNITY] find answers. The library is offering books, DVDs, in-library events, and online curriculum, [add other activities if your library is doing additional activities and add: **with a Kick-off Event on _____ date, if date is set**] to help Baby Boomers make better decisions about their money and plan for retirement by taking advantage of free, unbiased resources offered at the library.

[If the Kick-off is scheduled add this paragraph] A Kick-Off Event to launch the library training is scheduled at the [LIBRARY NAME] on [DATE AND TIME]. Advance registration is recommended by stopping by or contacting the library at [PHONE NUMBER and Email]. Participants who attend both the Kick-Off and Wrap-Up events and participate in the online curriculum will be eligible for the drawing of an iPod Shuffle. [add “and other prizes” if your library is gathering those].

NOTE: All libraries except Grand Island, Central City, and Lexington should include the information about Cooperative Extension. Erin and Kathy are not/no longer associated with them—so Grand Island, Central City, and Lexington can just list local partners.

[YOUR LIBRARY] and community partners, including UNL Cooperative Extension [**and other local partners you have collaborated with**], are promoting free resources designed especially to help Baby Boomers planning for retirement better manage money, credit, investments, and debt—and learn to avoid identity theft, protect their privacy, and steer clear of financial scams and fraud.

“**NAME of LIBRARY** is a now a go-to resource in our community for unbiased information about money and investing. Our aim is to help people make well-informed financial decisions for themselves and their families.” said [title and name of your spokesperson, YOUR LIBRARY]. “For many families, money is still tight. More people are turning to us to learn about budgeting,

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Ryan, Mary Jo

From: Ryan, Mary Jo
Sent: Monday, November 24, 2014 11:58 AM
To: McManus, JoAnn
Subject: Marketing Financial Education Activities
Attachments: ColumbusFinEdflyer.pdf; ColumbusFinEdhandouts.pdf; ColumbusNewspaper11-30-14.doc

TO: Libraries in the *Smart Investing @ your library*® Builds Nebraska Communities Project

Hi All. I hope you are enjoying introducing your community to the FINRA Financial Education resources. In the next few days you will be receiving posters and rack-cards from the Library Commission. You can customize them and use them to promote your Financial Education activities BEFORE your kickoff event and AFTER the kickoff THROUGHOUT the training window. We also hope you will continue to promote the curricula AFTER your training window. They will be up on the Web and any Nebraskan can take advantage of this amazing resource—right up until June 30, 2015. We cannot be certain about availability after that.

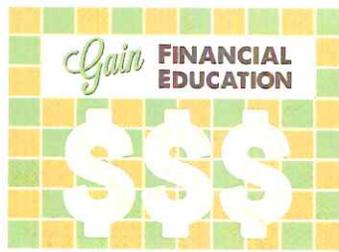
Also, I've attached a sample of how Columbus Public Library is using the materials. Thank you Karen Connell for sharing your customized examples and your great newspaper article.

Feel free to use all of this material as you see fit. If you alter them significantly, please send them to JoAnn or myself so that we can submit them to FINRA/ALA for approval before you use them. Share them with community organizations and at community meetings. If you have any community holiday activities coming up, this is a great time to share the news about these fine resources. Encourage your community members to contact the library to get their ID and Password so that they can go online and work through the curriculum whether or not they will be attending the kickoff or wrap-up events.

Thanks again for all that you do for your communities. Please let me know if I can help you with promotion,
mjr

Mary Jo Ryan, Communications Coordinator
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Lincoln NE 68508-2023, 402-471-3434, 402-471-2083-FAX
New E-mail: maryjo.ryan@nebraska.gov
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"If we couldn't laugh, we would all go insane," Jimmy Buffett.



Smart Investing@your library® Builds Nebraska Communities

*A grant awarded by the
American Library Association and the FINRA Investor Education Foundation
to the Nebraska Library Commission and the Northeast Library System
to provide financial literacy training at 22 libraries across Nebraska*

As you continue to prepare to offer financial education activities and classes through your libraries, you are probably finishing up the staff training and submitting the post-evaluation. All staff and volunteers that complete the training and the evaluations by the deadline will be entered into a drawing for a Kindle e-reader! You should have received a merchandising packet (bookmarks, posters, tent tags mailed June 23) to help you alert your library customers to your new information and resources that will help them make informed decisions about budgeting, money management, saving for college, buying a home, retirement planning, and more. Please let us know if you didn't receive this merchandising packet.

Now is a good time to start planning for how you will reach your target audience (Young Adults—age 20-40, Retirees, or Pre-retirees), who may, or may not, be current library customers. Steps to get started include:

- Identify the individual(s)—staff &/or volunteers—that will handle marketing.
- Customize (and share with news outlets in your area) the attached **news release** template to help communicate with the community about the new materials available in the library.
- Check out the “**Smart Investing@your library® Media Training Guide**” at <http://smartinvesting.ala.org/wp-content/uploads/2011/08/How-to-Work-with-the-Media-2.0-Training-Guide.pdf>. It has great ideas on how to pitch this story for radio or print. You might find just the right journalist to champion your project—one that wants to retire someday and may need one of your books or DVDs.
- Watch the ALA Webinar “**Taking a Blended Approach to PR**” at <http://smartinvesting.ala.org/pr-webinar/>. This webinar focuses on how to embrace a broader definition of communications...using social media along with traditional media relations to create the right mix for building awareness.
- Plan to attend a **Nebraska Library Commission Webinar** in August to work on planning your local marketing campaign. At this Webinar, staff and volunteers involved in the *Smart Investing@your library® Builds Nebraska Communities* project will come together via Go to Webinar to plan a local marketing campaign. Participants will initiate a process to select a target market for financial education activities, and will identify strategies and resources to communicate with them. Please let us know about your availability for this webinar by **taking the Doodle Poll, by July 24**, at <http://doodle.com/cg5yw2gn2vf4hnds>. Be sure to click on **Show all twelve options** when you get to the poll.

Thanks so much for working on this important educational project.



**Nebraska
Library Commission**



**MONEY
FOR COLLEGE?**

**MONEY TO
BUY A HOME?**

**MONEY FOR
RETIREMENT?**

Ask @ your library[®] about learning opportunities

Nebraskaccess.nebraska.gov/moneyandinvesting.asp

Smart Investing @ your library[®] Builds Nebraska Communities



Nebraska
Library Commission

ALA American
Library Association



This program is made possible by a grant from the FINRA Investor Education Foundation through Smart Investing @ your library[®], a partnership with the American Library Association. This program is sponsored by the Nebraska Library Commission and Northeast Library System.



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Financial Education @ your library®
Ask @ your library®
about learning opportunities



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**Smart Investing @ your library®
Builds Nebraska Communities**