

Hands on Banking – Volunteer Training

Thank you for your interest in becoming a volunteer for the Hands on Banking program. To get started, follow the steps below for a successful volunteer session.

WHY HANDS ON BANKING

Hands on Banking is an award-winning financial education program that is provided by Wells Fargo. It is a great way to use your allotted volunteer hours (16) throughout the year. Check out the [Hands on Banking Overview Page](#) for a video with more information.

TALK TO AN ENTERPRISE IMPACT TEAM (EIT) CHAIR / SHADOW AN EVENT

Volunteering can be an intimidating experience, especially if you're new. We recommend meeting with an EIT Chair to talk about volunteering and get information from someone who's volunteered with the program before. Also, it is highly encouraged to go with a volunteer to a Hands on Banking event (in-person or virtually). This will help you get used to the presentation flow and ease any fears you have about presenting.

FIND AN ORGANIZATION

If you have an organization, that's great! If you need help finding a place to volunteer using Hands on Banking, reach out to your local Community Relations team / contact or email hobinfo@wellsfargo.com.

If you are looking for a way to introduce yourself, use the following [letter template](#). It can be e-mailed or used as a guide when calling the organization. Feel free to share the [Hands on Banking Fact Sheet](#) to help explain what the Hands on Banking program is.

SET A DATE

Once you've found an organization, be sure to set a date for your volunteer session.

MATERIALS

Volunteer materials can be found on the [Wells Fargo Volunteers](#) page on the Hands on Banking website. There are presentations, handouts and certificates available for emailing or sharing virtually. There are materials for the following age groups – Youth | High School | Adults / Young Adults. *NOTE – Volunteer materials must be downloaded and used on a personal device.*

VOLUNTEER / PRESENT

After you've met with an EIT Chair or an [Enterprise Volunteer Team Member](#) about Hands on Banking and volunteering with it, it's time to get out and volunteer in the community. Below are tips to help make your volunteer session a successful one.

TIPS AND BEST PRACTICES

- The presentations are scripted and will take around 30 minutes to complete.
- Update the cover page with your name, title, and date prior to sharing it.
- There are leave behinds that you can print and give or email to your participants.
- *You must use a personal device for all volunteering.*
- **Practice, practice, practice!** Practicing your presentation can help smooth things out for the actual volunteer day. Being familiar with the materials (slides and presenter notes) will help you be more confident during your volunteer event.
- If you have questions, reach out to the EIT for Financial Health, a Hands on Banking Champion or email hobinfo@wellsfargo.com.
- *Do not refer participants back to Wells Fargo. Hands on Banking is a public service and is not to be used to refer Wells Fargo products to participants.*

DAY OF THE EVENT

- If you're not using a projector, print the presentation with notes so you have access during your presentation.
- Show up at least 10 minutes early. Test your projector and prepare your materials.
- Check that your camera and microphone both work if your presentation is virtual.
- Hand out participation documents (optional).
- Leave time for a brief Q&A session.
- Collect Feedback / Log Your Hours
 - Have participants take a survey using the [Participants Feedback Form](#).
 - Give feedback to Hands on Banking about your event using the [Volunteer Feedback Form](#).
 - Log your volunteer hours at <http://tmgiving.wf.com/>.
- Remind participants to visit the Hands on Banking websites (<https://handsonbanking.org> | <https://youth.handsonbanking.org>) to continue to learn and strengthen their financial skills.