



**TXCPA**  
**FORT WORTH**  
 Organized by the Branding and  
 Community Outreach Committee

## Bank

### Volunteer Responsibilities:

- **All** participants will go to the Bank first. Review the participant card and identify the monthly take home. **You should strongly encourage savings. See options below.**
- Explain: Point out that their full monthly take home paycheck has been deposited into the checking account. Review the savings incentive options and determine if the participant wants to transfer 0%, 5%, or 10% to the savings account. At the end, participants will receive 1% interest on the ending balance of the savings account.
- Explain: All participants are new bank customers and eligible for the first month savings incentive program. After visiting **all** booths, if participant returns to the bank and has not dipped into savings, a savings incentive bonus will be deposited to the savings account. If participants access money from savings to pay bills during the event, they will no longer qualify for the bonus. There is no penalty for accessing the savings funds; they just won't receive the bonus.
- Explain: The financial advisors booth will help make the transfers from savings to checking later if the participant's checking balance gets low before all booth purchases have been made.
- Initial the participant's card to indicate that the participant visited your booth.
- At the end of the event, if participant presents card with all booths complete, help with the savings interest and bonus deposits when applicable.

	Checking	Savings	Savings Interest	Potential Savings Bonus
Option 1	100%	0%	Not applicable	Not applicable
Option 2	95%	5%	Deposit 1% of month end savings balance as interest earned.	Deposit a \$5 new customer savings incentive bonus if the savings were not accessed to pay bills.
Option 3	90%	10%	Deposit 1% of month end savings balance as interest earned.	Deposit a \$10 new customer savings incentive bonus if the savings were not accessed to pay bills.