



The Office of Financial Capability provides information to the public on matters of personal finance with an emphasis on the financial and economic literacy of Wisconsin's youth. The Financial Capability Team brings together financial literacy, financial wellness and inclusion, college affordability, and the Wisconsin 529 College Savings Program to help advance a savings mindset for all Wisconsinites throughout every life stage.

Visit dfi.wi.org for more information.

Wisconsin Department of Financial Institutions Office of Financial Capability: Programs & Initiatives



ABLE Accounts

ABLE Accounts are tax-advantaged savings accounts for certain individuals with disabilities. Wisconsin residents who qualify to open an ABL account may use another state's plan as Wisconsin does not currently offer an ABL program.



College Affordability

DFI offers free resources to help students, parents, and educators talk about and prepare for college. The "**Look Forward to Your Future**" website provides curated and timely information to those on their path to higher education.



College Savings Plan

Edvest and **Tomorrow's Scholar** are the tax-advantaged college savings plans in the **Wisconsin 529 College Savings Program**.

Employers are invited to offer **Edvest at Work** as a benefit to employees.



Financial Literacy

Wisconsin educators are encouraged to work with DFI's Office of Financial Capability and utilize the resources on DFI's **Financial Literacy in Education** webpage to teach financial literacy to students, community members, and families.



Financial Wellness

DFI's **Financial Wellness Checklist Center** provides resources that help individuals and families establish and follow a financial wellness course. Resources assist with creating spending plans, getting insured, managing debt, and retirement.



Governor's Council

The **Governor's Council on Financial Literacy and Capability** provides guidance and strategies to the Office of the Governor and DFI that aim to improve the financial capability, literacy, and inclusion of all Wisconsin residents.



Wisconsin Saves

The statewide **Wisconsin Saves Automatic Saving Initiative** encourages Wisconsin employers to help their employees increase personal emergency savings by educating them on the advantages of automatic split payroll deposit.



ELEVATE Wisconsin

ELEVATE Wisconsin™ is a financial wellness program that provides unbiased online instruction in personal finance and investing to Wisconsinites. Employers are encouraged to sign up for our waitlist to be considered for the program in 2023.

Contact the Office of Financial Capability with questions or partnership opportunities. Thanks!

DFI Secretary-Designee
Cheryll Olson-Collins
DFISecretary@dfi.wisconsin.gov

College Savings Program
Jessica Wetzel
Jessica.Wetzel@dfi.wisconsin.gov

Financial Literacy
David Mancl
David.Mancl@dfi.wisconsin.gov

College Affordability
Cheryl Rapp
Cheryl.Rapp@dfi.wisconsin.gov