WORKING WITH *schools.*

Your step-by-step guide to getting into the classroom: who to contact, what to send, how to secure the date, and how to deliver a class students remember.

everything is built. you just show up!

STEP 1
FIND YOUR SCHOOL

STEP 2
MAKE THE ASK

STEP 3
SECURE THE DATE

STEP 4
DELIVER & GROW

THE OPPORTUNITY

WHY SCHOOLS *work.*

When you step into a classroom to teach financial literacy, you're doing more than giving a presentation. You're becoming a trusted guide in a world where most students have never had anyone explain how money, credit, and homeownership actually work. Few professionals are willing to put in the time to teach. That's exactly why it works.

6 in 10

next-generation homebuyers expect the housing system to work against them, and only 12% trust housing professionals not to take advantage of them (*2026 NextGen Homebuyer Report*). Trust is built early. You can be the one who builds it.

WHAT IT DOES FOR YOUR BUSINESS

LONG-TERM PIPELINE

A student you teach today may become a client in a few years. Their parents and teachers may refer someone right away.

TRUST → REFERRALS

Educators and administrators become advocates when they see the value you bring their students.

DIFFERENTIATION

Most mortgage professionals would never think to volunteer in a classroom. Showing up as an educator sets you apart in a way no ad campaign can.

COMPOUNDING

As word spreads, you get invited back and referred to other schools and organizations in the district.

> *"I started teaching monthly classes at my daughter's high school. Teachers began sitting in, which led to new client relationships and loan closings. My outreach even led to introductions with the principal and city council."*
>
> **VICMA L. · MORTGAGE ADVISOR & FHIQ AMBASSADOR**

You don't have to choose between serving your community and growing your business. This playbook shows you how to do both, *one classroom at a time.*

STEP ONE

1 FIND YOUR *school.*

Start with one or two schools where you already have a connection, or where you'd like to build one. High schools are the sweet spot, but middle schools, alternative programs, and career centers all welcome financial literacy.

WHO TO CONTACT

- Career or guidance counselors
- Family & consumer science or business teachers
- Senior advisors or college prep coordinators
- Athletic directors (access beyond the classroom)
- Principal or vice principal's office

HOW TO FIND THEM

- Search the school website's staff directory
- Call the front office: "Who coordinates guest speakers or financial literacy programming?"
- Ask teachers or coaches you already know
- Search LinkedIn for staff at local schools

PRO TIP: START WITH WHO YOU KNOW

A friend who teaches. A neighbor who coaches. A client who works at a school. Start there. One introduction can open the door to an entire district.

one intro = a whole district

BEST TIMES TO PITCH

Financial Literacy Month (April), senior nights, career days, back-to-school orientations, and parent nights. Reach out 4 to 6 weeks ahead: teachers plan early, and counselors book speakers well before the semester fills up.

STEP TWO

2 MAKE THE *ask.*

Reach out with a simple, warm message. Personalize it with your own story, and always attach the two documents schools ask for: the **one-pager** (what we offer at a glance) and the **syllabus** (the session-by-session breakdown). Both are in Your Toolkit on page 7.

COPY-PASTE EMAIL TO A SCHOOL

Subject: Free financial literacy classes for [School Name] students

Hi [Name],

I'm [Your Name], a local mortgage professional and volunteer with FirstHome IQ, a nonprofit dedicated to financial literacy education for the next generation.

We offer free, interactive classes on topics like budgeting, credit, and homeownership basics. They're designed to be engaging and require no prep on your end. We bring everything: presentation materials, activities, and games students love.

I've attached a one-pager about the program and a syllabus of the sessions we offer. You can book a single class or a full series, whatever fits your calendar.

Would you be open to a quick call to see if this could be a fit for your students?

[Your Name] · FirstHome IQ Ambassador · [Your Contact Information]

PHONE OR IN-PERSON SCRIPT

"Hi [Name], I'm [Your Name]. I volunteer with a nonprofit called FirstHome IQ. We provide free financial literacy classes for students: ready-to-go sessions on budgeting, credit scores, homeownership. Things students don't usually learn in school but really need. We bring everything, and it's completely free. Would you be open to trying one class? Even a 30-minute session during advisory or homeroom is a great starting point."

IMPORTANT

Always personalize your outreach. Mention something specific about the school, share why you care about this work, and lead with the value to their students, not yourself. The more genuine you are, the better the response.

3 STEP THREE

SECURE THE *date.*

Don't leave the conversation without something on the calendar. Once you're in the room, the rest is easy. Offer flexible options so "yes" is simple:

30 min

A single class during advisory, homeroom, or a regular class period. The easiest first yes.

3–4 sessions

A mini-series on budgeting, credit, and rent vs. own. Fits inside an existing course unit.

Full series

All 10 Money Matters sessions from the syllabus. A semester-ready program.

FOLLOW-UP SCRIPT (IF YOU HAVEN'T HEARD BACK)

"Hi [Name], just following up on my note about the free financial literacy classes through FirstHome IQ. I know how busy things get, so no rush at all.

If it's easier, I'm happy to stop by for five minutes to drop off our one-pager and syllabus. Sometimes it's easier to see it on paper.

Either way, I'd love to find a time that works. Even one class is a great starting point."

PRO TIP: ALWAYS WALK AWAY WITH A DATE

If they need to check with someone, say: "Totally understand. Can I follow up with you next Tuesday?" Give them a specific day so the conversation doesn't die.

get it on the calendar!

STEP FOUR

4 DELIVER A GREAT *experience.*

You don't have to design content or carry the whole class yourself. Every course, presentation, and handout lives at **learn.firsthomeiq.com**. Pick your role:

OPTION 1

LEAD THE CLASS

Choose a ready-to-teach presentation from the syllabus. Slides, presenter guides, and activities are prepped.

OPTION 2

COORDINATE & SUPPLY

Coordinate the relationship and supply the materials while FHIQ or a certified Ambassador facilitates. You stay visible in the partnership.

OPTION 3

CO-PRESENT

Partner with another Ambassador or an FHIQ team member. Great if you're new to presenting.

THE PROVEN CLASS FRAMEWORK

From Dan Keller, top 1% loan officer and FHIQ Ambassador who has taught in schools for years:

- **Start with your story.** Share a personal moment that connects you to financial literacy. Be real. Students can tell.
- **Engage early.** Open with "What does money mean to you?" and get them talking.
- **Play a game.** Own Your Future Jeopardy or Would You Rather turns the room competitive and gets everyone involved. This is what makes you memorable.
- **Cover 2–3 core concepts.** Don't try to cover everything.
- **Close with action steps.** One thing students can do today.
- **Want more?** Find more exercises and activities you can use at learn.firsthomeiq.com.

ENGAGEMENT TIP

Games turn a good presentation into a great one. Even a 5-minute Jeopardy round at the end of class leaves a lasting impression and makes you the presenter they want to invite back.

EVERYTHING IS ALREADY BUILT

YOUR *toolkit.*

SCHOOL ONE-PAGER ↗

A shareable overview of what FirstHome IQ offers schools. Want your own contact info on it? Click "File, Make a copy" in Canva and update it with your details. Then attach it to emails or hand it off in person. It does the selling for you.

canva.link/8lgqzymvd0cdzqm

OWN YOUR FUTURE SYLLABUS ↗

The session-by-session curriculum schools ask for: all 10 sessions with formats and what's included. Click "File, Make a copy" to customize it with your name and contact info at the end of the document, then send it with your first email or bring it to your meeting.

docs.google.com/document/d/1L7GmywqTgDMxKCO4aMYGV03O91GyaHMrMXntHFhGBf8

COURSES & CLASSROOM MATERIALS ↗

Every presentation, presenter guide, handout, quiz, and video in one place. Money Management, Credit & Debt, Rent v Own, Path to Own, and the full Money Matters presentation series.

learn.firsthomeiq.com

GAMES FOR THE CLASSROOM ↗

Own Your Future Jeopardy: team trivia with three themed boards. Project and play. **Would You Rather:** debate real financial trade-offs, with pros and cons built into every card.

firsthomeiq.com/game · firsthomeiq.com/wouldyourather

YOUR 30-DAY QUICK START

WEEK 1 • REACH OUT

- [ ] Pick 3–5 schools in your area
- [ ] Find the right contact at each
- [ ] Send the email script with one-pager + syllabus

WEEK 2 • FOLLOW UP

- [ ] Follow up with non-responders
- [ ] Offer to stop by in person
- [ ] Get one date on the calendar

WEEK 3 • PREPARE

- [ ] Pick your presentation at learn.firsthomeiq.com
- [ ] Test the games so you're comfortable
- [ ] Ask us for help if you want it

WEEK 4 • DELIVER & GROW

- [ ] Teach your first class
- [ ] Thank the organizer, book the next one
- [ ] Share your impact with FHIQ

FROM CLASSROOM TO COMMUNITY

ONE CLASS CAN CHANGE A *future.*

Students graduate able to drive and vote, but without basic money management or wealth-building knowledge. That's the gap you're filling. The Ambassadors who do this consistently say the same thing: it's the most rewarding part of their work, and it builds some of their strongest referral relationships.

Start with one school. Deliver one great class. And watch what happens next.

WE'RE HERE TO HELP

Need help choosing a presentation, prepping your first class, or building an outreach plan for your market? Contact **kristin@firsthomeiq.com** or reach out in the Ambassador community.

ALL MATERIALS

Courses, presentations, games, and handouts:
learn.firsthomeiq.com

you've got this. we've got you.