

Travis Credit Union Grant Highlights

Who they are: [Travis Credit Union](#) is headquartered in Vacaville, CA, in between Sacramento and San Francisco. They wanted to ensure that their employees were financially competent to feel confident about their own financial health and equip their employees with the education necessary to help their members succeed as well.

Summary of grant: Travis CU created a mandatory financial education program for their employees to help their financial health and well-being. The project focused on the four pillars of financial health: plan, save, spend, and borrow. The goal was to have 80% of employees certified by 12/31/19 and 100% certified by 12/31/20.

What happened?

- Travis Credit Union exceeded their goal of 80% completion with 98.77% of employees certified.
- By April 30th, 2020, 95.45% of employees are certified.

Key learnings & takeaways for credit unions:

- Financial competency for employees is vital to working with members and members' success, as well as their own financial health.

