



NEFE Research Funding Grant Eligibility Requirements Checklist

Researcher

- At a minimum, the principal investigator has a master's-level degree in a discipline relevant to the research and the greater research team has at least one member with a terminal degree.
- The principal investigator is affiliated with a U.S. nonprofit college, university, research organization, or other 501(c)(3) nonprofit organization.
- If the research involves human subjects, the principal investigator will ensure the project gains approval or exemption from the institutional review board at the affiliated organization.
- The principal investigator has no conflicts of interest and ensures any additional members of the research team also are free from conflicts of interest.

Organization

- The research will be conducted at an organization that has been designated tax exempt under the Internal Revenue Service Code Section.
- The organization does not discriminate on the basis of age, color, disability, marital status, national origin, race, religion, sex, sexual orientation or veteran status.

Project

- The research question requires rigorous empirical or theoretical analysis.
- The research will be of the same quality exhibited in scholarly academic journals.
- The proposed project outcomes are impactful to the field of financial well-being and are directly relevant to the financial well-being of the public.
- The scope is domestic (i.e., the proposed project involves the direct study of U.S. households and individuals).
- The project does not include the development, execution, evaluation, expansion or administration of specific programs, courses, curricula or other products.
- The project does not have commercial or proprietary elements.

Funding Priorities

More information on NEFE's finding priorities can be found at:

<https://www.nefe.org/research/get-funding/funding-priorities.aspx>.

Please check the box for each of NEFE's funding priorities that your project aims to address.

- Measurement:** Studies that re-evaluate current financial literacy metrics and how financial literacy, behavior, perception, knowledge and skill can be measured more effectively.
- Systemic Inequality:** Studies that investigate knowledge, skill and wealth disparities, especially among populations that are statistically more likely to experience systemic barriers to improving their financial well-being.
- Data and Methodological Limitations:** Studies that examine bias—specifically as it pertains to personal finance— to help our field identify knowledge gaps and to strengthen research data and design by including traditionally less heard voices.
- Youth Focus:** Studies that examine inconsistencies in exposure to financial education among youth in the U.S. as well as variations in financial socialization and education within family units.

NEFE's Vision:

NEFE envisions a nation where everyone has the knowledge, confidence and opportunity to live their best financial life.

NEFE's Mission:

NEFE champions effective financial education. We are the independent, centralizing voice providing leadership, research and collaboration to advance financial well-being.

<https://www.nefe.org/research/get-funding/eligibility.aspx>.