  
**Letter of Inquiry for NEFE Funded Research**

**Project Title**

Character limit: 100

**Amount Requested**

Character limit: 8

**Duration of the Project in Months**

*Please note that NEFE’s preferred project duration is about 18 months. Some variation is permissible.*

Character limit: 2

**Project Summary**

*Provide a one-paragraph description of the project that summarizes the main research question(s), their importance to the field of financial education, and the method(s) of data collection and analysis the project will employ.*

Character limit: 600

**Principle Investigator (PI) and team**

*Please list the principal investigator, any key team members, their role in the project, and any expertise related to the project. For each member, attach a CV or resume and ensure that all qualifications and relevant experiences have been included.*

Character limit: 500

**IRB Review**

*Indicate whether this project has already gone through IRB review at your institution (or has been deemed exempt). If the project has not yet undergone IRB review, indicate your best estimate of whether it will qualify for exemption, expedited review, or full review— as well as the anticipated timeline at your institution.*

Character limit: 500

**Prior Literature**

*Describe how the proposed research fits into, expands, or fills a gap in the existing academic literature related to financial education. This is not meant to be a full literature review, rather the high-level strands or themes. Indicate whether this is a new line of inquiry or a continuation of prior work.*

Character limit: 600

**Project Methodology**

*Describe the existing data set the project intends to use and/or the new data that will be collected, including collection methodology. Expand upon the main research question(s) and methodology referenced in the project summary.*

Character limit: 1000

**Impact**

*Describe how the proposed research will impact or benefit the field of financial education, as well as other researchers, nonprofit leaders and advocates, practitioners, and/or policy makers. Please also address how this project fits within the Personal Finance Ecosystem, found at* [*https://www.nefe.org/initiatives/ecosystem/default.aspx*](https://www.nefe.org/initiatives/ecosystem/default.aspx)

Character limit: 1000

**Anticipated Outputs**

*Please list the anticipated deliverables of the project (examples include manuscripts, reports, policy briefs, power point presentations etc.). Describe any plans for publication or other dissemination activities to further the researcher’s impact.*

Character limit: 600

**Appendix**

*Citations (required)*

*CV or resume (required)*

*Up to 2 visual aids that may be used to further explain your study, such as figures, tables, charts etc. (optional)*