



FOUNDATION

Press Release

SIFMA Foundation Launches Free Family InvestQuest™ Platform to Help Americans Build Financial Capability for New 530A/Trump Accounts

New Digital Investing Experience Designed to Spark Family Conversations, Prepare Young People for Asset Building and Long-Term Financial Success, and Support Summer Learning

New York, June X, 2026 – The SIFMA Foundation, a leading nonprofit dedicated to expanding access to financial education and preparing young people for lifelong financial security, today announced the launch of Family InvestQuest™ (Family IQ), a new educational investing digital platform designed to help families and new investors better understand long-term investing and build financial confidence and capability.

Created specifically for families and first-time learners, Family IQ introduces foundational investing concepts in an approachable and engaging way, helping young people and their caregivers build confidence in financial decision-making before advancing to more complex investing strategies.

The launch comes at a critical moment as policymakers prepare to roll out new “Trump Accounts,” to encourage families to begin investing earlier for children’s futures. As more Americans gain access to investment tools to support long-term savings, financial education will be essential to helping families understand how to navigate those opportunities and build confidence participating in the financial system.

“Family IQ was created to help families start important financial conversations and give young people the confidence to understand investing over time,” said Melanie Mortimer, President of the SIFMA Foundation. “The Foundation’s newest experiential learning platform, Family IQ builds on our 50-year history of helping 24 million individuals achieve stronger financial life outcomes through free investor education. As more families gain access to new investment opportunities for children, we believe financial education must come first. By making investing approachable, understandable and fun, we can help families plan for the future.”

Family InvestQuest features a hands-on family investing simulation, beginner-friendly educational videos, a robust learning hub, and extended resources for continued knowledge and skill building.

Investing Simulation: An exciting, interactive simulation mirrors Trump Account assets with \$1K pre-invested in an index fund, annual contribution choices and simulated growth for 18

years to demonstrate the power of compounding and how consistent saving and investing decisions can shape long-term outcomes.

Family IQ Video Series: Engaging and beginner-friendly educational videos introduce financial concepts in a practical, real-world context throughout the simulation.

Family IQ Learning Hub: Short educational modules, anchored by real-world examples, definitions, full lessons, and quizzes to test users' mastery of investing fundamentals, explain core concepts such as what it means to invest, how wealth grows over time, and the role of index funds in long-term investing.

Family IQ Resource Center: The investor education learning journey continues with extended resources and access to SIFMA Foundation's suite of free educational tools such as the Summer Stock Market Game™ competition and SMG IQ, which offer families summer learning outside the classroom.

At a time when summer learning loss remains a challenge, SIFMA Foundation's Summer Stock Market Game, SMG IQ, and Family IQ provide an accessible opportunity for families to build financial knowledge together.

The launch of Family IQ builds on the SIFMA Foundation's decades-long commitment to expanding economic opportunity through financial education. For nearly 50 years, the Foundation has developed innovative, research-backed programs that help young people understand investing, personal finance, and the role of the capital markets in everyday life. Through classroom learning, teacher resources, summer programming, and hands-on simulations such as The Stock Market Game™, the Foundation has empowered almost 24 million students nationwide to strengthen academic skills, improve financial capability, and gain greater confidence preparing for their futures. By working closely with educators, families, and the financial industry, the Foundation continues to make financial education more accessible, engaging, and impactful for communities across the country.

"We know that financial habits often begin at home," Mortimer added. "Family IQ helps parents and caregivers start conversations that can shape how young people think about money, saving, investing, and asset building for the rest of their lives."

About the SIFMA Foundation

The SIFMA Foundation is committed to closing opportunity gaps by fostering greater knowledge of the financial markets for individuals of all backgrounds. Drawing on the support and expertise of educators and the financial industry, the Foundation provides financial education to strengthen economic opportunity across communities and increase awareness of the benefits of the global marketplace. Since 1977, the Foundation's most notable program, The Stock Market Game™, has guided almost 24 million students on their path to financial independence by boosting their life skills, academic achievement, and social-emotional learning. For more information on the SIFMA Foundation, visit sifma.org/foundation.

Summer Stock Market Game

The SIFMA Foundation's Summer Stock Market Game (SMG) is a free national program that helps students continue learning about personal finance, investing, and wealth-building during the summer months. Built around the Foundation's flagship Stock Market Game™, the program empowers young people to explore real-world financial concepts through hands-on experiences that build knowledge, confidence, and critical thinking skills. By keeping students engaged when school is out of session, Summer SMG helps combat learning loss, expand economic opportunity, and inspire the next generation to take an active role in their financial futures. Through the support of educators, families, and industry partners, the program advances the Foundation's mission of preparing all young people—regardless of background—for lifelong financial well-being. For more information on Summer SMG visit www.stockmarketgame.org.

Family InvestQuest

Family InvestQuest™ (Family IQ) is a free educational investing experience created by the SIFMA Foundation to help families build financial confidence together. Designed for beginners, Family IQ introduces foundational concepts such as saving, investing, compound growth, and long-term financial planning through an engaging and accessible learning journey. By encouraging conversations about money at home and helping young people understand how wealth can grow over time, Family IQ empowers families to make informed financial decisions and prepare for future opportunities. The program reflects the Foundation's belief that financial knowledge is a pathway to economic opportunity and that every family should have access to the tools needed to build a more secure financial future. For more information on Family IQ visit <https://familyinvestquest.org>.

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