



## Letter of Inquiry for NEFE Funded Research

### **Project Title**

Character limit: 100

### **Amount Requested**

Character limit: 20

### **Duration of the Project in Months**

Character limit: 2

### **Principal Investigator (PI) and Team**

*List the principal investigator and any key team members and their role in the project. Please add a brief description of their qualifications and relevant experience (1-2 sentences for each person).*

Character limit: 2000

### **Project Summary**

*Provide a one-paragraph description of the project that summarizes the main research question(s), their importance to the field of personal financial capability, and the data and methodology that will be employed.*

Character limit: 600

### **Prior Literature**

*Describe how the proposed research fits into, expands, or fills a gap in the existing academic literature related to personal financial capability. This is not meant to be a full literature review, rather the high-level strands or themes.*

Character limit: 1,000

### **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: 2,500

### **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

### **Research Agenda**

*Describe how this research project fits into the PI's (and team's) overall personal research agenda. Indicate whether this is a new line of inquiry or a continuation of prior work and why the proposed research project is interesting to the PI (and team).*

Character limit: 1,000

### **Impact**

*Describe how practitioners and educators in the field of financial capability might benefit from the proposed research. That is, beyond expanding the body of academic literature, describe the real world impact this research project could have. Please also address the importance of this work to the field of financial capability.*

Character limit: 2,000

### **Placement within the Personal Finance Ecosystem**

*Describe where the project fits within the Personal Finance Ecosystem, found at [https://www.nefe.org/\\_images/about/NEFE\\_PersonalFinanceEcosystem.pdf](https://www.nefe.org/_images/about/NEFE_PersonalFinanceEcosystem.pdf).*

Character limit: 600