2017 DASH for the STASH
Guide for Host Locations

What is the DASH for the STASH program?
Now in its fourth year, DASH for the STASH is a multi-State investor education and protection program and poster contest that arms investors with the unbiased and non-commercial information they need to make crucial investing decisions.

DASH features a series of informational posters posted in participating DASH host locations. To play, participants visit a participating location, read the content on each poster, scan the unique QR code to access that topic's quiz question, and submit their answer via smartphone, tablet, or computer. There are four posters each covering a specific investor education and protection topic plus one rules poster. Each topic poster is rich in investor education and protection content and it takes approximately 5-10 minutes to read. One winner in each participating State will be chosen in a random drawing of eligible participants who logged the correct answer for all four posters. The winner will receive a $1,000 contribution to a new or existing Individual Retirement Account (IRA) for 2017.

DASH for the STASH posters feature four topics (one topic per poster):
1. Financial Advisers
2. Investment Fees
3. Investor Fraud
4. Building a Nest Egg

The program and contest is sponsored by your State Securities Administrator and the Investor Protection Institute (IPI), a nonprofit organization devoted to investor education and protection. The DASH contest is held at participating locations across your State and is much like a scavenger hunt – but instead of finding objects, participants answer quiz questions via smart phone, mobile device or desktop computer.

The 2017 DASH program is also offering a national online version (similar to a video game format) which runs from April 1-October 31, 2017. Winners will be randomly selected each month from among all participants who answered all questions correctly. Each winner (7 winners total) of the national online DASH will receive a $150 IRA contribution for 2017. Participants can only win DASH once whether they participate online or in person via the poster version at a host location. Note: The IRA contribution for the in-person poster version (posters you display at your location) is higher to encourage residents to visit educational institutions and to learn more about your programs and resources. Participants can only win DASH once whether they participate online or in person. You can access the national online version (available on April 1) at: www.iInvest.org/programs/dash-for-the-stash/

How Does a Participant Enter the DASH Contest?
1. A participant visits your location and reads each of the contest posters (rules poster is also displayed).
2. The participant scans the QR code (or types the URL) found in the lower right corner of each of the four educational posters to access the quiz question using a smartphone, tablet, laptop or public computer available at the host location. Each QR code is unique to its poster and accesses only the quiz question for that poster. There is one quiz question for each poster.
3. The participant is asked to enter his/her name, email address and location where they are entering the contest, and then he/she is logged into the contest and able to access the quiz question.
4. When the quiz question appears, the participant chooses an answer (multiple choice). The participant is notified as soon as his/her answer is submitted if it is correct or incorrect.
5. Scan the QR code for the next poster and repeat the process until he/she has answered the questions for all four posters.
6. To be entered in the contest, the participant must answer the quiz questions for all four posters. The participant must answer all quiz questions correctly for a chance to receive the statewide prize of a $1,000 IRA contribution.

What Is the QR Code?

A Quick Response (QR) code is a barcode that can be read by a mobile device and looks like a series of square dots. Here is an example:

By scanning a QR code, you can quickly access information on the linked webpage without remembering a long URL. The DASH for the STASH QR codes take participants to the quiz question for each poster. To read any QR code, your smartphone or mobile device must have a QR app – it's free to download. If you have an iPhone, visit the App Store to find a free app. Android users can use the Google Play Store to find a free app. To get help using a QR code app, refer to the video tutorial https://youtu.be/kP3pBpTQscU. (Note that standard data rates apply, per the participant's phone contract.)

You can also access the poster quiz question using the shortened link in the bottom right corner of the poster if you prefer not to use to the QR code.

Do Participants Need a Smart Phone to Play?

No, participants do not need a smart phone or other mobile device to play, but it is the easiest method for many participants. Participants can play by computer – they simply type in the URL found below the QR code on each poster. Multiple participants may use the same device to enter, since it is the email that is keyed to a participant's answers.

How Will Participants Know If Their Answers Are Submitted?

In education, immediate feedback is a good thing. So participants are shown a message – either "congratulations, you're right" or "sorry, the correct answer is...." after they log an answer.

What Is Required For A Chance To Win The Contest?

The winner in each State is randomly selected from among the participants who correctly answered all of the quiz questions. The IPI then verifies that the selected winner is eligible to receive the IRA contribution. For IRA eligibility rules, please visit IRS.gov. Participants do not have to be any particular age to enter and win. Host location staff can enter the contest however DASH project principals (the contact listed on your location's DASH survey) and others serving as project principals are not eligible to win. The Statewide winner will be notified following the end of your State's contest. If your State is letting hosts determine their own contest dates, the Statewide winner will be notified after October 31, 2017.

The winner must provide proof of eligibility to contribute to an IRA for 2017 and will not receive cash nor any other form of payment in lieu of the IRA contribution. A $1,000 check will be sent directly to the bank or brokerage firm as a 2017 contribution to a new or existing IRA for the benefit of the participant. For tax purposes, the winner's Social Security number must also be provided to IPI as required by the IRS.

The participating location with the most DASH participants in your State will receive a $100 contribution to be used for investor education and protection purposes such as materials for your collection.

Who Can Host A DASH For The STASH Event?

Libraries, colleges, high schools, workplaces and community organizations make good venues to offer the DASH. To be a DASH host, you must agree not to sell any financial or investing products or services as part of your DASH program, contest and/or event.

What Is Required Of A Host?
The basic requirements for all DASH host locations are:
- Display the set of DASH posters (4 educational posters and one rules poster) during your State's program dates for a minimum of one week and a maximum of two months. Host locations can also choose to run your program more than once as long as the total program length doesn't exceed two months and all events occur during your State's program dates. Visit www.iInvest.org/programs/dash-for-the-stash/ for your State's program dates.
- Promote the DASH contest and encourage individuals to read the posters and enter the contest.
- Host a DASH event.
- To be a DASH host, you must agree not to sell any financial products or services as part of your DASH program, contest and/or event.

DASH events can vary in scale, depending on what works best for your location. You can host a DASH event(s) as part of other educational events or you can have your own event dedicated to the DASH program that is as simple as directing people to the posters and showing them how to enter the contest. You can host as many DASH events as you would like. Hosts can tailor their DASH contest and event as:
- A new event created specifically for the DASH
- Part of an event already scheduled
- The program for an organization's monthly meeting
- An activity for a college or high school classroom
- A workplace lunch and learn seminar
- Part of a staffed exhibit, such as for an open house or an educational fair

A DASH for the STASH event is appropriate for:
- Libraries
- College educators (extension educators, financial aid or student affairs departments)
- High school educators
- Homeschool groups
- Workplaces, particularly employee benefits or employee wellness programs
- Coworking spaces (e.g. WeWork, Cove)
- Local government agencies
- Young Professionals Clubs
- Student clubs – at the college level or high school FCCLA, DECA, FBLA, etc.
- AAII meetings for investors
- Better Investing club meetings
- JumpStart workshops
- Accredited Financial Counselors (AFCs) and other financial professionals who provide investor education
- Boy Scouts or 4H clubs
- Professional groups such as Kiwanis, Lions, Rotary, AAUW, PEO

What Is The Cost To Hosts?
There is no cost to participate as a DASH host location. The DASH program is sponsored by the IPI and participating State Securities Administrators. IPI provides the contest materials, handles the contest mechanics and evaluation and manages contest entries. Hosting a DASH event(s) does not have any inherent costs. A host may decide to provide refreshments or other items for participants, but that is strictly optional and at the host location's discretion.

What Is Provided To Hosts?
Host locations will receive and have access to the following materials and resources:
- SurveyMonkey survey link to gather more information from hosts on how they plan to run and promote their DASH program
- Four investor education and protection contest posters

- Two rules posters
- Promotional resources including flyer, video tutorial, table tent design (PDF), sample social media messages, sample press release
- Instructional webinar led by the DASH multi-state coordinator
- Additional investor education materials supplied by IPI
- A DASH multi-state program coordinator to assist you with your DASH program including promotion, posters, questions, etc.
- Following the DASH program, we'll send you a quick SurveyMonkey survey link requesting your feedback.

How Do Hosts Promote A DASH Event?
Visit the DASH website for event resources (www.iInvest.org/programs/dash-for-the-stash). A flyer, video tutorial, table tent design (PDF), sample social media messages, sample press release and table tent will available to download on the DASH website by March 2017.

For your event, consider having a speaker to discuss investing topics. You may want to extend an invitation to your State Securities Administrators office, a local extension educator, college professor, investment clubs, young professional groups and others. We encourage hosts to display books about investing and introduce other resources offered. DASH-related presentations must be educational, unbiased and non-commercial and all speakers must agree not to sell any products or services during the presentation.

The IPI will promote the DASH via its social media channels and can share your messages. We encourage you to connect with IPI:
- Twitter: www.twitter.com/IPI_News or @IPI_News
- Facebook: www.facebook.com/InvestorProtectionInstitute

Can I Trust The DASH Contest Is Not A Scam?
DASH for the STASH is an investor education and protection program and contest from the IPI and is in its fourth year.

The Investor Protection Institute (IPI) is an independent nonprofit organization that advances investor protection by conducting and supporting unbiased research and groundbreaking education programs. IPI carries out its mission through investor education, protection and research programs delivered at the national and grassroots level in collaboration with State Securities Administrators, nonprofits, universities, and other strategic partners. IPI is dedicated to providing innovative investor education and protection programs that will make a meaningful difference in the financial lives of Americans in all walks of life and at all levels of sophistication about financial matters. For more information, visit www.iInvest.org

Your State Securities Administrators office is sponsoring the program with IPI. We encourage you to verify the DASH program and contest with your State Securities Administrator. You can identify your State Securities Administrator via the North American Securities Administrators Association (NASAA): www.nasaa.org/about-us/contact-us/contact-your-regulator.

When you sign on as a DASH host location, you are agreeing to hang the posters and offer an educational event or include the DASH in an already planned educational event. You can only receive the DASH materials by completing the SurveyMonkey survey link included in your invitation. Your DASH event is an educational event and the posters involve reading and learning about saving and investing. DASH is a learning tool, not a sales opportunity. We do not collect names for marketing purposes. We also require that all hosts and speakers agree not to sell any financial products or services as part of the DASH program.

What If Participants Do Not Enter An Email Address?
Participants must provide their first and last name and a valid email address to enter the contest. We will email the winner. If the email is returned as "invalid address," IPI will randomly choose another winner from among participants who answered all quiz questions correctly. Note that this email comes from Don M. Blandin, President and CEO of the Investor Protection Institute and the Investor Protection Trust. Contact information for participants is only for this use and will not be shared.

If We Host An Event, How Do We Handle Questions?
We don't expect hosts to be experts on saving and investing but they should know how the DASH for the STASH works. Should there be program questions or technical issues, participating hosts may contact the 2017 DASH multi-state coordinator DASH@iInvest.org.