



The **FINANCIAL AWARENESS** Foundation
"Your Financial Partner"
Improving Financial Awareness & Financial Literacy™

2014 Improving Financial Awareness & Financial Literacy Campaign

Dear Colleagues,

Would you like to help make a BIG difference while you increase your bottom line?

As many of you are aware National Estate Planning Awareness Week is coming up October 20th - 26th this year. We'd appreciate your assistance in alerting your colleagues and professional networks about this important initiative, and encourage their active participation and support.

Over a dozen state Governors are already on board as they understand the importance of improving their citizen's financial awareness and financial literacy. The American Institute of Certified Public Accountants is once again hosting a free public webinar on the building blocks to successful estate planning, and much more is in the works. We'll report more in our next interim report.

Please join the leading financial service and nonprofit associations and their members, professionals and their financial service companies; nonprofits, small and large employers, technology companies, municipalities and government agencies, and the news media in supporting and participating in the 6th anniversary of [National Estate Planning Awareness Week](#) and six months later during [National Financial Literacy Month](#) every April.

Check out what your colleagues and associates are doing about improving financial awareness and financial literacy by previewing the latest [Campaign Report & Scrapbook](#)

www.TheFinancialAwarenessFoundation.org/pdf/TFAF-SpringCampaignReport&Scrapbook.pdf

Together we have the potential to advance and contribute to one of the most amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy.

The Big Problem - Did You Realize That?

1. **Dearth of Estate Plans.** It is estimated that over 120 million Americans do not have an up-to-date estate plan to protect themselves, and their families, making estate planning one of the most overlooked areas of personal financial management? Financial and estate planning is not just for the wealthy, it's important process for everyone. With advance planning, issues such as guardianship of children, managing bill paying and assets in the event of sickness or disability, care of a special needs child or parent, long-term care needs, and



distribution of retirement assets can all be handled with sensitivity, care, and at a reasonable cost.

2. **Over-Reliance on Social Security**. The majority of Americans lack the ability to plan adequately for their retirement as most Americans over 65 are totally dependent on Social Security. With proper knowledge and planning, future generations will certainly have a more secure future.
3. **Not Just for the Wealthy**. Most people mistakenly believe that concepts like financial awareness, financial planning, retirement planning, planning for major expenditures, investment planning, tax planning, insurance planning, and estate planning, are just for the wealthy. When, in fact, few people today can really attain and maintain their financial security without forethought and a strategy to protect themselves and their families. This attitude can be financially harmful and can be avoided with proactive action.

Managing personal finances today is more complicated and more important than ever before. We're living longer, but we're saving less. We feel less secure in our jobs and homes than we did in the past. We see our money being drained by the high cost of housing, taxes, education, and health care while dealing with the uncertainty of investments and our economy. We worry about the future, or unfortunately in many cases, simply try not to think about it.



Andrew Watt, FlnstF, President & CEO, of the Association of Fundraising Professionals (AFP), representing individuals and organizations that raise more than \$100 billion in charitable contributions every year around the world for countless causes. Andrew leads the association's professional staff based in three offices (Arlington, Va.; Toronto, Ontario and Mexico City, D.F.). Andrew views nonprofits as a critical interface between the public and government and is an outspoken advocate and champion for philanthropy on Capitol Hill, in the Canadian Parliament and other legislatures around the world. He has been appointed to the IRS Advisory Committee on Tax Exempt Organization (ACT) and has served on the Public Policy Committee of Independent Sector since 2012. He has been invited to speak in many countries about fundraising and philanthropy, working to bring charities and governments together to maximize the impact of philanthropy and help engage citizens with their communities and their world.



Jim Stovall is a strong supporter for improving financial awareness and financial literacy, the President of the Emmy Award-winning Narrative Television Network, a highly sought after author and platform speaker, philanthropist, and a past national champion Olympic weightlifter. He is the author of 20 books including the best-selling book, *The Ultimate Gift*, which is now a major motion picture starring James Garner and Abigail Breslin. Its sequel, *The Ultimate Life* was released in September of 2013 in theaters across the country. *The Gift of a Legacy*, based on Jim's novel, is in pre-production with an anticipated 2015 release.



Paul G. Schervish, M.Div., Ph.D., is Professor of Sociology and Director of the Center on Wealth and Philanthropy (CWP) at Boston College, served as a Fulbright Professor in Philanthropy at University College, Cork, Ireland, a distinguished visiting professor at the Indiana University Center on Philanthropy, a founding faculty member of the Legacy Companies Boston, and is the 2013 recipient of the Distinguished Career Award from the American Sociological Association's section on Altruism, Morality and Social Solidarity.

Our distinguished honorary co-chairs are strong advocates for financial awareness and financial literacy and are instrumental in making the core principles of financial and estate planning available to the public as well as to financial service associations and organizations, nonprofits, technology companies, and major employers.

Our Goals

As leaders in the financial and estate planning industries, we have first-hand experience with the successes and challenges Americans face and want to help. Our goals are to:

- Improve the nation's financial awareness and financial literacy across all age, income and demographic groups.
- Alert the public why having a current and up-to-date financial and estate plan is an important financial responsibility not only to themselves but to their families and loved ones.
- Motivate the public to take action to in get and keep their financial house in order with up-to-date financial and estate plans.
- Help the public find the right professionals to cost effectively help establish and keep their financial and estate plans up-to-date.
- Help educate financial service professionals and organizations to better serve the public.

Our strategy is to touch the vast majority of America at least twice a year with a subtle concentrated financial awareness content media campaign through:

- National Estate Planning Awareness Week (NEPAW-3rd Week in October)
- National Financial Literacy Month (NFLM-April)

We understand that this is a massive undertaking, but is being accomplished with the assistance of the news media and through leading financial service and nonprofit associations and their members, professionals, financial service companies and nonprofits, small and large employers, technology companies, and our government that are using these campaigns as strategic venues to semi-annually share high quality financial and estate planning content with their associates and the public.

Working Together

[The Financial Awareness Foundation](#) along with the following professional associations: National Association of Estate Planners and Councils, the American Institute of Certified Public Accountants, the American Association of Attorney-Certified Public Accountants; the American Bar Association Section of Real Property, Trust and Estate Law; the Society of Financial Service Professionals, the National Academy of Elder Law Attorneys, the Partnership for Philanthropic Planning, the Financial Planning Association®, the Association of Fundraising Professionals, and The



International Association of Advisors in Philanthropy have supported National Financial Literacy Month and National Estate Planning Awareness Week (October). Together these organizations represent nearly 1,000,000 financial professionals.

Please join the many accountants, attorneys, estate planners, financial planners and advisors, insurance agents and brokers, trust officers, and nonprofit executive directors and their associates who are members of these associations and the other financial service professionals to alert, educate, motivate, and assist the American public to cost effectively establish and keep their financial and estate plans up to date.

Here Are Some Fun and Easy Ways for You to Partake

1. Place financial and estate planning editorial content within your websites, newsletters, social media groups, local newspapers, and radio/television/web-based shows, in support of National Estate Planning Awareness Week and National Financial Literacy Month. If you need content please contact us or see the sample articles Press & Industry Media Kits and Guides found under the Campaign tab at www.TheFinancialAwarenessFoundation.org
Be sure to email us your articles, checklists, ads, and seminar/webinar activity notices so we can highlight them and you in the current Campaign Report and Scrapbook.
2. Encourage your organization and associates to host or take part in community-wide programs built around estate and financial planning during the months of October and April. If you need help or ideas with these programs, or scripted programs please contact us. You can also see the "Basic Building Blocks to Successful Estate Planning" a version of such a presentation we did as a national live recorded webinar for The Stelter Company's nonprofit community during the last National Estate Planning Awareness Week, and again earlier this year for the Almond Board of CA executives and staff as an in house employee benefit program. A version of this presentation and slides and attendee gift can be seen and downloaded at www.stelter.com/webinars.html
3. Circulate financial awareness campaign materials and the Press & Industry Media Kit and Guides to your members, colleagues, associates, and other parties as you see appropriate and encourage them to support and participate in these important events. These can be found under the Campaign tab on www.TheFinancialAwarenessFoundation.org
4. Build and schedule your organizations annual marketing, branding, advertising, and social media programs around these amazing, broad-based, multi-faceted campaigns for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your clients, members, and prospects.

Help us advance our work by making a generous donation to us now at



Thank you.

This is a real winning approach to solving a major social challenge.

- Families benefit by learning the essential principles of smart financial management so they can make better every day informed financial decisions and have the best possibilities to reach and maintain their financial freedom and security
- Employer benefit from having less stressed and happier more productive employees

- Financial professionals and their companies benefit by acquiring new business from better informed and motivated clients
 - The news media wins by delivering valuable content to its readers
 - Nonprofits win with increased donations, planned gifts, alternate beneficiary selections, and bequests from donor's estate plans
 - The overall community wins with a much stronger and financially sound economy.
- Please contact us for additional information, questions and if you have further thoughts.

On behalf of the many participating associations and organizations, and professionals "thank you" for your efforts in making the 2014 National Estate Planning Awareness Week and the 2015 National Financial Literacy Month a continuing growing success, and for assisting in having an ongoing positive impact on improving financial awareness and financial literacy.

Respectfully submitted,

Valentino

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"Improving financial awareness & financial literacy" SM

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