

Valentino

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Sent: Thursday, March 05, 2015 11:31 PM
To: v.sabuco@thefinancialawarenessfoundation.org
Subject: 2015 Improving Financial Awareness & Financial Literacy Campaign



The **FINANCIAL AWARENESS** Foundation
"Your Financial Partner"

Improving Financial Awareness & Financial Literacy™

2015 Improving Financial Awareness & Financial Literacy Campaign

Dear Friends and Colleagues,

We have launched the 2015 Improving Financial Awareness & Financial Literacy Campaign built around the strategic venues of National Financial Literacy Month in April and six months later during National Estate Planning Awareness Week in October.

Would you like to help solve a major social problem while benefiting your organization directly?

Here are some interesting facts:

1. Over 50% of Americans do not have a current / updated Estate Plan.
2. The [Consumer Financial Protection Bureau \(CFPB\)](#) released a report in January that examined the link between financial education and financial well-being. A key finding was that while many adults desire to educate themselves to become more financially literate; they often seek out that information only within their social networks. This cuts across all demographics, including education level and income. This is very alarming: People are making critical life decisions based on information gained from fragmented sources, and in many cases from out of date or inaccurate information presented by nonprofessionals or subject area experts!
3. The greatest wealth transfer in history has begun. It's estimated that \$59 trillion will be transferred from over 116 million American households over the next 46 years. As reported in [A Golden Age of Philanthropy Still Beckons: National Wealth Transfer and Potential for Philanthropy](#) by John J. Havens and Paul G. Schervish of the Center on Wealth and Philanthropy Boston College.
4. Without financial and estate planning a significant portion of these assets will
 - Be wasted
 - Not go to the right person(s) or organization(s)
 - Not be used as intended, or could be used much better

These unfortunate events can be remedied with financial and estate planning done

now!

As many of you are aware National Financial Literacy Month is April. We welcome and would appreciate your assistance in alerting your colleagues and professional and social media networks about this important concentrated personal finance content media blitz and encourage them to actively participate and take on a leadership role their communicates to get this important message out.

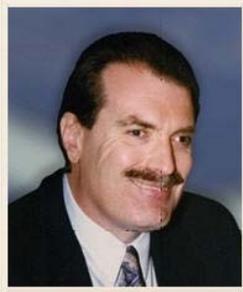
Last year

- Many state Governors understanding they importance of improving financial awareness and financial literacy through these strategic venues issuing supporting proclamations
- Major professional associations hosted free webinars on financial and estate planning for the general public and financial service and nonprofits professionals
- Many of your colleagues from financial service companies and their professionals, nonprofits and their professionals, employers, technology companies, educational ,institutions, news media, participated in these important events as you can see from within the [2014 Fall Improving Financial Awareness & Financial Literacy Campaign Report & Magazine](#)

Please join your colleagues and our Distinguished 2015 Co-Honorary Chairs for Improving Financial Awareness & Financial Literacy



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.



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.



Andrew Watt, FlntF, 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.

and participate in these important improving financial awareness and financial literacy events.

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 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:

- Substantially improve 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, loved ones, and philanthropy.
- Motivate the public to take action to in get and keep their financial house in order with up-to-date financial and estate and gift plans.
- Help the public find the right professionals to cost effectively help implement and keep their financial and estate and gift plans up-to-date.
- Educate financial service and nonprofit professionals and organizations to better serve the public.

The Strategy is to touch the vast majority of the general public at least twice a year with a subtle concentrated personal financial content media blitz built around the strategic venues of:

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

We understand that this is a massive undertaking. As we move into the 7th year it's being accomplished through leading organization that include:

- Financial service associations and their members
- Nonprofit associations and their members
- Financial service professionals and their companies

- Nonprofits
- Employers
- Technology companies
- Educational institutions
- Government entities
- News media



Fun, easy, and profitable ways to participate in the financial awareness campaigns and implement into your 2015 calendar

1. Place financial and estate planning editorial content into your website, newsletters, social media groups, your chapters local newspapers, and radio/television/web-based shows and ads, in support of National Financial Literacy Month (April) and National Estate Planning Awareness Week (3rd week in October). If you should need content please contact us or see the free sample articles within the Press & Industry Media Kits and Guides found under the [Campaign tab at www.TheFinancialAwarenessFoundation.org](http://www.TheFinancialAwarenessFoundation.org).
2. Add an "Improving Financial Awareness & Financial Literacy Page to your website. This is an excellent opportunity to show your support and to provide your employees, clients, prospects, and members of your community with a great platform to share important financial information.
3. Host and present a 'general public' and a 'professional' national webinar built around built around personal financial and estate planning during the months of April and October. We have scripted public presentations that can be easily customized and branded that are entitled
 - o **"Building Blocks to Successful Financial Planning"**
 - o **"Building Blocks to Successful Estate Planning"**
 - o A version of the "Building Blocks to Successful Estate Planning" presentation and slides and attendee gift can be seen and downloaded at www.stelter.com/webinars.html. This was presented as a national live recorded webinar for The Stelter Company's nonprofit community during the 2013 National Estate Planning Awareness Week, and again in 2014 for the Almond Board of CA executives and staff as an in house employee benefit program, and with the [American Endowment Foundation for the 2014 National Estate Planning Awareness Week](http://www.AmericanEndowmentFoundation.org).
4. 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 beneath downloads. We can work with you to customize and co-brand an Improving Financial Awareness & Literacy Campaign Guide & Information Kit to meet your needs.
5. Ask your State Governor and other political contacts to provide supporting proclamations for National Financial Literacy Month April and for Estate Planning Awareness Week in October. Semi-annually contact your state governor and request a supporting proclamation for
 - o National Financial Literacy Month (April)

- National Estate Planning Awareness Month (October) This is usually an online form that's easy to complete. [Here's a link to a sample proclamation](#). Do the same with your Congressmen and Congresswomen, and with local Mayors & City Council Members
- 6. Invite one of our speaker bureau members to address your conference, event, and meetings on the Importance of Improving Financial Awareness & Financial Literacy for your organization.
- 7. Build and schedule some of your organizations annual marketing, branding, advertising, and social media programs around these strategic venues for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your members, their organization's employees, donors, and prospects.

To assist you with planning and participation for the 2015 Improving Financial Awareness & Financial Literacy Campaigns we developed the [2015 Improving Financial Awareness & Financial Literacy Campaigns & Programs Overview and Planner](#).

Who benefits from this undertaking?

- You benefit by being recognized as a thought leader that is significantly helping to solve a major social problem.
- You create goodwill that will attract new patrons, retain existing ones, and build support for your own other initiatives.
- You, your employees, patrons, and prospects benefit by receiving personal financial and estate planning materials to improve their personal financial position and receive a powerful campaign and program to use within your organization to generate new sources of revenues.
- Families benefit by learning the essential fundamentals of smart financial management so they can make better every day informed financial decisions, and have the best possibilities to reach and maintain their personal financial freedom, security and philanthropy.
- Financial advisors and their organizations benefit by acquiring new business from more informed and motivated clients.
- Employer benefit from having less stressed and happier more productive employees.
- Nonprofits and fundraisers benefit with increased donations, planned gifts, alternate beneficiary selections and bequests.
- Everyone actually benefits with a stronger and financially sound economy.

By joining other leading financial and nonprofit associations, companies, and their professionals; nonprofits, employers, educational institutions, government agencies, and the news media, together we have the potential to help advance and contribute to one of the most amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy.

Please share this important communication with your social media networks, colleagues and associates and encourage them to support and participate in the 2015 Improving Financial Awareness & Financial Literacy Campaign and Programs.

We are hard at work to become the 'foundation of choice' for improving financial awareness and financial literacy for the public, and amongst financial service professionals and their associations and companies, nonprofits, educational institutions, municipalities, the news media, and associated financial service and technology companies.

We welcome your assistance and support. To learn more about us and our

financial awareness campaigns and efforts, and 'how you can make a meaningful difference' visit us at www.TheFinancialAwarenessFoundation.org and join our new discussion group on [LinkedIn](#).

For additional information about us and our financial awareness campaigns, programs and activities, or to discuss volunteer activities, sponsorships, planned gifts, and contributions and grants to The Financial Awareness Foundation, please contact me directly.

[Click here](#) if you received this communication from a colleague and would like to receive future mailing from us.

Thank you for your efforts in helping to make the Improving Financial Awareness & Financial Literacy Campaigns and Programs a growing success.

Respectfully submitted,

Valentino

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Dedicated to "Improving financial awareness & financial literacy" SM

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Help us do more by making a tax deductible contribution today!



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