

# Background & Sample Proclamations In Support of The Improving Financial Awareness & Financial Literacy Movement

And proclaiming and celebrating it

- April as Financial Literacy Month, and
- October as Estate & Gift Planning Awareness Month



**We believe having better personal finance knowledge changes your world and the world around you... FOREVER!**

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## The FINANCIAL AWARENESS Foundation

A 501(c)(3) Nonprofit Organization dedicated to significantly Improving Financial Awareness & Financial Literacy™  
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(ver031922)

## Overview – Plan & Strategy & Request for a Supporting Proclamation

Greetings,

Thank you for interest in improving financial awareness and financial literacy.

With so many people on the verge of running out of money before their life expectancy, many families burdened with large amounts of student loans and other forms of debt, and more than half of our adults do not have nor understand why it is important to have an up-to-date financial, estate and gift plans to protect themselves and their families, we have a serious problem. This lack of financial awareness and financial literacy places a **HUGE** growing amount of pressure on families and friends, employers, nonprofits; as well as the ultimate safety net the state and federal government.

As a brief backgrounder, we are The Financial Awareness Foundation a 501(c)(3) nonprofit organization. The Foundation serves as a nonpolitical “financial awareness advocate” for the public, the financial service and nonprofit professionals and their organizations, educational institutions, municipalities, employers, and news media.

Our mission is to significantly help solve a major social problem dealing with the lack of financial awareness and financial literacy. We believe that teaching financial literacy and the essential principles to smart money management are very important. This gives people address everyday financial decisions in a more manner and have the best possibilities to remain maintain their personal and financial goals, enjoy financially secure debt-free future, and pass on their values, knowledge and assets to future generations to make their lives and this world a better place.

To help address the lack of financial awareness and the financial illiteracy epidemic we began taking an active leadership role to recognize organizations and their management, and individuals that are championing improving financial awareness financial literacy. We are then uniting them with other associations, organizations, nonprofits, educational municipalities, employers, and news media to actively focus their vast community resources into **The Improving Financial Awareness & Financial Literacy Movement** with its semi-annual concentrated personal finance content media blitz around the strategic campaign venues



- **Financial Literacy Month** (April) and six months later with
- **Estate & Gift Planning Awareness Month** (October) (We worked with Congressman Thompson's Office during 2007 and 2008 to help create a proclamation that was co-authored by 50 bi-partisan Congresswomen & Congressmen; we have helped advance and promote it since.)

The plan is to touch everyone at least twice a year through these strategic campaign venues, with educational and motivating content, reminders and tools for making wise informed lifelong financial decisions and to **get and keep your financial house in order by having current financial, estate and gift plans.**

The Foundation further delivers and develops exceptional educational content for the general public and for financial service and nonprofit professionals, and educational institutions that support the public's financial and estate planning and charitable planning needs.

We are hard at work to become the 'foundation of choice' for improving financial awareness and financial literacy for The People - the general public, and amongst the financial service and nonprofit professionals and their organizations, educational institutions, educational institutions, municipalities and the news media.



We understand that this is a massive undertaking. As we move into the second decade it's being accomplished through leading organizations 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

Further we've began a national campaign to annually get all 50 Governor to create and sign supporting improving financial awareness & financial literacy proclamations for every

- April as Financial Literacy Month and
- October as Estate & Gift Planning Awareness Month.

We would welcome your assistance in providing one from your state, and local municipalities.

With very little effort you can help this happen!

Please assist by contacting your state governor, local city council, city manager, and major with a request that they provide a Supporting - The Improving Financial Awareness and Financial Literacy Movement Proclamation proclaiming for their state / city / county



You can see the actual proclamations and what other are doing from last year's ***The Improving Financial Awareness & Literacy Movement Report and Magazine™*** that can viewed at

[www.TheFinancialAwarenessFoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf](http://www.TheFinancialAwarenessFoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf)

Also to save you some time, over the following pages we prepared several sample model proclamations for your convenience and use and editing as you see appropriate.

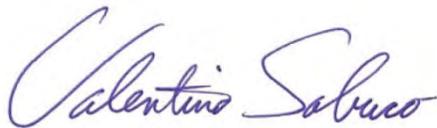
If you have any question, require additional information, or would like to develop The Improving Financial Awareness and Financial Literacy Movement campaign for your state or municipality or nonprofit or organization, or discuss the above further please do not hesitate to contact us.

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.

To learn more The Movement, and our work and **'how you can make a meaningful difference'** visit us at [www.TheFinancialAwarenessFoundation.org](http://www.TheFinancialAwarenessFoundation.org).

Thank you for your consideration and we look forward to hearing from you.

Respectfully submitted,



**Valentino Sabuco**, Executive Director  
**The Financial Awareness Foundation**  
A 501(c)(3) Nonprofit Dedicated to  
*"Improving financial awareness & financial literacy..."<sup>SM</sup>*

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## Three Sample Proclamations

For your consideration the following pages contain three sample proclamations that you can use as a model and edit as you see appropriate for your unique situation.

1. Combined proclamation proclaiming ***April as Financial Literacy Month and October as Estate & Gift Planning Awareness Month***
2. Proclamation proclaiming ***April as Financial Literacy Month***
3. Proclamation proclaiming ***October as Estate & Gift Planning Awareness Month***



[Insert seal-Note this should be modeled after Proclamation done in the past the Municipality / Organization being requested.]

The Office of the \_\_\_\_\_ of \_\_\_\_\_ (Add title President, Governor, Elected Official) (Municipality / Organization)

### PROCLAMATION

In Support of The Improving Financial Awareness & Financial Literacy Movement  
April shall hereafter be known as *Financial Literacy Month* & October shall be known as  
*Estate & Gift Planning Awareness Month* in \_\_\_\_\_ (Country/ Municipality / Organization)

**Whereas**, given \_\_\_\_\_ (municipality) economic statue, \_\_\_\_\_ (citizens) are energized and engaged in growing our economy while improving our communities we also see that a greater understanding and familiarity with financial markets will lead to increased economic activity and growth; and

**Whereas**, improving financial and financial literacy empowers THE PEOPLE to make better informed everyday money decisions so they can live a quality life without outliving their wealth and pass on their values, knowledge and assets to future generations to make their lives and this world a better place.

**Whereas**, financial education has been linked to improved lifestyles, lower delinquency rates for borrowers, higher participation and contribution rates in retirement plans, improved spending and saving habits, improved risk-management, higher net-worth with positive knowledge, attitude, & behavior changes; and

**Whereas**, careful estate and financial planning can greatly assist all in building and preserving asset built over a lifetime for the benefit of family, heir, and nonprofits; and

**Whereas**, financial, estate and gift planning involves many considerations, including safekeeping of important documents, documentation of assets, operation of law, preparation of appropriate legal instruments, insurance, investments, availability of trust arrangements, charitable giving, inter-vivos care of the benefactor, and other important factors; and

**Whereas**, estate and gift planning encourages timely decisions about the method of holding title to certain assets, the designation of beneficiaries, the possible transfer of asset during the life of the benefactor; and

**Whereas**, the implementation of an estate and gift plan starts with sound education and planning, and then may require the proper drafting and execution of appropriate legal documents, including wills, trusts, and durable power of attorney for asset management and healthcare; and

**Whereas**, this proclamation encourages citizens to carefully consider financial, estate and gift planning to build and preserve assets built over a lifetime for the benefit of family, friends, heirs and nonprofits; and

**Whereas**, during the months of April and October, The Financial Awareness Foundation, [add your organization and others you see appropriate] encourages governmental agencies, educational institutions, the financial services industry, consumer groups, nonprofits, employers, the news media and to join together in a personal finance content media blitz though sharing articles, workshops and seminars, webinars and other innovative activities that will educate and empower all to make wise informed lifelong financial decisions and to get and keep their financial house in order by having current financial, estate and gift plans.

**Now and thereafter**, I, \_\_\_\_\_ replace with name \_\_\_\_\_, the \_\_\_\_\_ of \_\_\_\_\_ (tile and municipality or organization) in support of **The Improving Financial Awareness and Financial Literacy Movement** do hereby proclaim **April as Financial Literacy Month** and **October as Estate & Gift Planning Awareness Month** in \_\_\_\_\_ (municipality or organization).

Signature \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Further, I encourage all resident of all ages to learn the essential principles of smart money management and to get and keep your financial house in order with a current financial, estate and gift plan. Careful financial, estate and gift planning is necessary not just for your piece of mind, but to give you and your families the best possibilities to reach and maintain your financial goals and dreams.



*For use with as a sample proclamation for April as Financial Literacy Month*

**Draft Proclamation in Support of Improving Financial Awareness & Financial Literacy-Proclaiming:  
April as Financial Literacy Month**

**Whereas**, managing personal finances today is more complicated and more important than ever before. We're living longer, but saving less. We feel less secure in our jobs and homes than we did in the past. We see our money drained by high cost of housing, taxes, education, and healthcare. We worry about the future, or unfortunately in many cases, simply try not to think about it;

**Whereas**, careful financial and estate and gift planning can greatly assist our citizens in accumulating and preserving assets built over a lifetime for the benefit of family, heirs, and charities;

**Whereas**, it is estimated that over 120 million Americans do not have nor understand the importance of having an up-to-date financial, estate and gift plans to protect themselves or their families in the event of sickness, accidents, or untimely death;

**Whereas**, only 26 percent of 13-to 21-year olds reported that their parents actively taught them how to manage money;

**Whereas**, a 2018 survey by the National Council on Economic Education found that only 1/3 of States require high school students to take a course in personal finance;

**Whereas**, there are more than 44 million borrowers who collectively owe \$1.5 trillion in student loan debt in the U.S. alone. The average student in the Class of 2016 has over \$37,000 in student loan debt;

**Whereas**, nearly half of Americans nearing retirement age (65 years old) have less than \$25,000 put away, according to the Employee Benefit Research Institute's annual survey. One in four don't even have \$1,000 saved.

**Whereas**, the FDIC estimates there are 10 million unbanked or underbanked American households;

**Whereas**, millions of people in the United States derive great benefits from the wide variety of products and services offered by the financial services industry in the United States, and such financial products and services allow individuals and families to build homes, start businesses, finance educations, buy cars, and meet the everyday needs of everyday life;

**Whereas**, a greater understanding and familiarity with financial markets will lead to increased economic activity and growth;

**Whereas**, financial education has been linked to lower delinquency rates for borrowers, higher participation and contribution rates in retirement plans, improved spending and saving habits, higher net-worth with positive knowledge, attitude, & behavior changes;

**Whereas**, financial literacy empowers individuals to make wise informed financial decisions and reduces the confusion of an increasingly complex economy;

**Whereas**, Whereas personal financial education is essential to ensure that individuals are prepared to manage money, credit, and debt, and become responsible workers, heads of households, investors, entrepreneurs, business leaders, and citizens;

**Whereas**, Congress found it important enough to ensure coordination of Federal financial literacy efforts and formulate a national strategy that established the Financial Literacy & Education Commission in 2003 and designated the Office of Financial Education of the Department of the Treasury to provide support for the Commission, and to proclaim April as Financial Literacy Month, followed by a Presidential Proclamation signed by President Obama proclaiming April 2011 a National Financial Literacy Month;

**Whereas**, The House of Representatives encourages the distribution of estate planning information by professionals to all Americans and passed H. Res 1499 in 2008 proclaiming the third week in October as National Estate Planning Awareness Week;

**Whereas**, during the month of April, The Financial Awareness Foundation (add your organization's name) encourages state and federal agencies, consumer groups, the media and the financial services industry will join together to conduct educational events through the media and in communities and schools to illustrate the importance of making wise informed lifelong financial decisions and to get and keep their financial house in order by having current financial, estate and gift plans.

**Whereas**, The Financial Awareness Foundation along with the leading professional associations such as: the American Institute of Certified Public Accountants, the American Academy of Attorney-Certified Public Accountants; the American Bar Association; the Society of Financial Service Professionals, the National Academy of Elder Law Attorneys, National Association of Estate Planners and Councils, the National Association of Charitable Gift Planners, the Financial Planning Association®, the Association of Fundraising Professionals, and The International Association of Advisors in Philanthropy have supported National Financial Literacy Week/Month and National Estate Planning Awareness Month. Together these organizations represent nearly 1 million financial professionals. The accountants, attorneys, estate planners, financial planners and advisors, insurance agents and brokers, trust officers, and nonprofit executive directors and development officers that are members of these associations, can help mobilize the financial and estate planning and nonprofit communities by providing support, tools, and education for the professionals and the public they serve.

**Whereas**, April should be designated as 'Financial Literacy Month'; and

**Now, therefore, I, \_\_\_\_\_, the \_\_\_\_\_ of \_\_\_\_\_ in support of The Improving Financial Awareness and Financial Literacy Movement do hereby proclaim April as Financial Literacy Month in \_\_\_\_\_.**

Signature \_\_\_\_\_  
Type name \_\_\_\_\_

Date \_\_\_\_\_

**Further**, I encourage all resident of all ages to learn the essential principles of smart money management and to get and keep your financial house in order with a current financial, estate and gift plan. Careful financial, estate and gift planning is necessary not just for your piece of mind, but to give you and your families the best possibilities to reach and maintain your financial goals and dreams.

## For use with as a sample proclamation for October as Estate & Gift Planning Awareness Month

Draft Proclamation in Support of Improving Financial Awareness & Financial Literacy and Proclaiming:

### October as Estate & Gift Planning Awareness Month

**Whereas**, improving financial and financial literacy empowers our citizens to make better informed everyday money decisions so they can live a quality life without outliving their wealth and pass on their values, knowledge and assets to future generations to make their lives and this world a better place;

**Whereas**, careful estate and gift and financial planning can greatly assist our citizens in preserving assets built over a lifetime for the benefit of family, heirs, and charities;

**Whereas**, it is estimated that over half our adults residents do not have nor understand the importance of having up-to-date estate and gift plans to protect themselves or their families in the event of sickness, accidents, or untimely death;

**Whereas**, estate and gift planning involves many considerations, including safekeeping of important documents, documentation of assets, operation of law in the various States, preparation of legal instruments, insurance, availability of trust arrangements, charitable giving, inter vivos care of the benefactor, and other important factors;

**Whereas**, estate and gift planning encourages timely decisions about the method of holding title to certain assets, the designation of beneficiaries, and the possible transfer of assets during the life of the benefactor;

**Whereas**, many of our adult residents are unaware that lack of estate planning and 'financial illiteracy' may cause their assets to be disposed to unintended parties by default through the complex process of probate;

**Whereas**, alternatives to disposition of assets after death, such as planned gift-giving, may accomplish a benefactor's goal of providing for his or her family and favorite charities;

**Whereas**, careful planning can prevent family members or other beneficiaries from being subjected to complex legal and administrative processes requiring significant expenditure of time, and greatly reduce confusion or even animosity among family members or other heirs upon the death of a loved one;

**Whereas**, important considerations as to donation of organs and use of life support functions may be made through the estate planning process;

**Whereas**, the implementation of an estate and gift plan starts with sound education and planning, and then may require the proper drafting and execution of appropriate legal documents, including wills, trusts, and durable powers of attorney for asset management and health care;

**Whereas**, The House of Representatives encourages the distribution of estate planning information by professionals to all Americans and passed H. Res 1499 in 2008 proclaiming the third week in October as National Estate Planning Awareness Week;

**Whereas**, during the month of October, The Financial Awareness Foundation (add your organization's name) encourages state and federal agencies, educational institutions, the financial services industry, consumer groups, nonprofits, employers, the news media and to join together in a personal finance content media blitz through articles, workshops and seminars, webinars and other innovative activities that will empower our citizens to make wise informed lifelong financial decisions and to get and keep their financial house in order by having current financial, estate and gift plans.

**Whereas**, The Financial Awareness Foundation along with the leading professional associations such as: the American Institute of Certified Public Accountants, the American Academy of Attorney-Certified Public Accountants; the American Bar Association; the Society of Financial Service Professionals, the National Academy of Elder Law Attorneys, National Association of Estate Planners and Councils, the National Association of Charitable Gift Planners, the Financial Planning Association®, the Association of Fundraising Professionals, and The International Association of Advisors in Philanthropy have supported National Financial Literacy Week/Month and National Estate & Gift Planning Awareness Month. Together these organizations represent nearly 1 million financial professionals. The accountants, attorneys, estate planners, financial planners and advisors, insurance agents and brokers, trust officers, and nonprofit executive directors and development officers that are members of these associations, can help mobilize the financial and estate planning and nonprofit communities by providing support, tools, and education for the professionals and the public they serve.

**Whereas**, October should be designated as 'Estate & Gift Planning Awareness Month'; and

**Now, therefore**, I, \_\_\_\_\_, the \_\_\_\_\_ of \_\_\_\_\_ in support of **The Improving Financial Awareness and Financial Literacy Movement** do hereby proclaim **October as Estate & Gift Planning Awareness Month** in \_\_\_\_\_.

Signature \_\_\_\_\_

Type name \_\_\_\_\_

Date \_\_\_\_\_

**Further**, I encourage all resident of all ages to learn the essential principles of smart money management and to get and keep your financial house in order with a current financial, estate and gift plan. Careful financial, estate and gift planning is necessary not just for your piece of mind, but to give you and your families the best possibilities to reach and maintain your financial goals and dreams.



For use on online requests

## Draft Communication for States and Municipalities with Online Proclamation Requests Tools

1. World leaders - [https://en.wikipedia.org/wiki/List\\_of\\_current\\_heads\\_of\\_state\\_and\\_government](https://en.wikipedia.org/wiki/List_of_current_heads_of_state_and_government)
2. In the US to go to your governor's website – here's a link to help you find it

[Click here to quickly get you to your state governors website](#)

<https://www.nga.org/cms/governors/addresses>

3. Once you are on the website locate the **Proclamation Requests** – this maybe located under the **Contact Us** tab
4. Complete the simple online form –
  - Using your name and resident information
  - If you are an Ambassador for The Financial Awareness Foundation or member of a nonprofit or financial service association you can note that
  - Here's some sample language that you can cut / paste into the description request part of the form. You are welcome to edit it as you see appropriate

Greetings and good afternoon,

I am writing you to as a resident of \_\_\_\_\_ and Ambassador for The Financial Awareness Foundation to voice concern over the lack of financial awareness and financial illiteracy epidemic facing our citizens. Further I would like to introduce you to the **Improving Financial Awareness & Financial Literacy Movement** and to the personal finance content media blitz built around the strategic campaign venues of **Financial Literacy Month** (April) and six months later during **Estate & Gift Planning Awareness Month** (October).

Further I would like to respectfully request that you join the **President and the many Governors** that in support of The **Improving Financial Awareness & Financial Literacy Movement** provided supporting **Proclamations** last year proclaiming

- **April as Financial Literacy Month**
- **October as Estate & Gift Planning Awareness Month**

**this can be can be accomplished in one or two proclamations.**

With so many people on the path to or verge of running out of money before their life expectancy, many families burdened with large amounts of student loans and other forms of debt, and more than half of our adults (120 million) not having nor understanding the importance of having up-to-date financial, estate and gift plans to protect themselves and their families, we have a serious problem. This lack of financial awareness and the financial illiteracy epidemic places a **HUGE** growing amount of pressure on families and friends, employers, nonprofits; as well as the ultimate safety net - the state and federal government.

There is a real solution to this lack of financial awareness and the financial illiteracy epidemic that revolves around better educating The People - the general public, financial service and nonprofit professionals to the essential principles to smart money management while motivating them to get and keep their financial house in order with current financial, estate and gift plans. People need access to better personal financial



management tools and information, to communicate and work more effectively with their financial advisors, and to make better every day informed money decisions.

You can learn more about this very important movement and see the President's and the many Governor's proclamations from ***The Improving Financial Awareness & Financial Literacy Movement Report & Magazine*** at the following link:

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>

Here is some suggested sample wording for proclaiming October as Estate & Gift Planning Awareness Month in \_\_\_\_\_ (add your state)

#### ESTATE & GIFT PLANNING AWARENESS MONTH

WHEREAS, careful estate and financial planning can greatly assist our citizens in building and preserving asset built over a lifetime for the benefit of family, heir, and nonprofits;

WHEREAS, estate planning involve many consideration , including safekeeping of important document , documentation of assets, operation of law in the various states, preparation of legal instrument, insurance, availability of trust arrangements, charitable giving, inter vivos care of the benefactor, and other important factors;

WHEREAS, estate planning encourages timely decisions about the method of holding title to certain assets, the designation of beneficiaries, and the possible transfer of asset during the life of the benefactor;

WHEREAS, the implementation of an estate plan starts with sound education and planning, and then may require the proper drafting and execution of appropriate legal document , including wills, trusts, and durable power of attorney for asset management and healthcare;

WHEREAS, Estate & Gift Planning Awareness Month encourage citizens to carefully consider estate and financial planning to build and preserve assets built over a lifetime for the benefit of family, friends, heirs and nonprofits;

WHEREAS, during the month of October, The Financial Awareness Foundation encourages state and federal agencies, consumer groups, the media and the financial services industry will join together to conduct educational events through the media and in communities and schools to illustrate the importance of making wise informed lifelong financial decisions and to get and keep their financial house in order by having current financial, estate and gift plans.

NOW, THEREFORE, I, do hereby recognize October as ESTATE & GIFT PLANNING AWARENESS MONTH

Proper signing

Further, I encourage all resident of all ages to learn the essential principles of smart money management and to get and keep your financial house in order with a current financial, estate and gift plan. Careful financial, estate and gift planning is necessary not just for your piece of mind, but to give you and your families the best possibilities to reach and maintain your financial goals and dreams.



Here is some suggested sample wording for proclaiming April as Financial Literacy Month in \_\_\_\_\_ (add your state)

#### FINANCIAL LITERACY MONTH

Whereas, improving financial awareness and financial literacy is essential to the financial stability of all citizens;

Whereas, managing personal finances today is more complicated and more important than ever before. We're living longer, but saving less. We feel less secure in our jobs and homes than we did in the past. We see our money drained by high cost of housing, taxes, education, and healthcare. We worry about the future, or unfortunately in many cases, simply try not to think about it;

Whereas, careful financial, estate and gift planning can greatly assist our citizens in accumulating and preserving assets built over a lifetime for the benefit of family, heirs, and nonprofits;

Whereas, personal financial management skills and life-long habits develop during childhood;

Whereas, a greater understanding and familiarity with financial markets will lead to increased economic activity and growth;

Whereas, financial education has been linked to lower delinquency rates for borrowers, higher participation and contribution rates in retirement plans, improved spending and saving habits, higher net-worth with positive knowledge, attitude, & behavior changes;

Whereas, improving financial and financial literacy empowers THE PEOPLE to make better informed everyday money decisions so they can live a quality life without outliving their wealth and pass on their values, knowledge and assets to future generations to make their lives and this world a better place.

WHEREAS, during the month of April, The Financial Awareness Foundation encourages state and federal agencies, consumer groups, the media and the financial services industry will join together to conduct educational events through the media and in communities and schools to illustrate the importance of making wise informed lifelong financial decisions and to get and keep their financial house in order by having current financial, estate and gift plans.

Proper signing

Further, I encourage all resident of all ages to learn the essential principles of smart money management and to get and keep your financial house in order with a current financial, estate and gift plan. Careful financial, estate and gift planning is necessary not just for your piece of mind, but to give you and your families the best possibilities to reach and maintain your financial goals and dreams.

This link will provide you with further background and research materials and sample wording that can be customized for your proclamation(s).

<http://www.thefinancialawarenessfoundation.org/pdf/DraftImprovingFinancialAwareness-NFLM-NEPAW-Proclamation.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.

Please provide us with a PDF copy of your proclamation and email to us at

**Insert your Email address:**

Thank you for your consideration and support and all you do.

Respectfully submitted,

**Your Name**

\*\*\*\*\*

**5. Once you receive a PDF of the proclamation, usually 1 to 4 weeks, please forward us a copy.**

Please contact us if you have any questions or require any additional information.

Thanks again for your participation and support on this very important mission to help improve financial awareness & financial literacy.



# Background Resources

In support of the improving financial awareness and financial literacy campaigns the following resources have been assembled for your use. If you have additional supporting information to contribute please email it to [Info@TheFinancialAwarenessFoundation.org](mailto:Info@TheFinancialAwarenessFoundation.org) Thank you.



## 1. Strategic Campaign Venues

### Financial Literacy Month

In 2004 the Senate passed Resolution 316 that officially recognized April as National Financial Literacy Month. In 2011 President Obama signed a Presidential Proclamation proclaiming April as National Financial Literacy Month. On March 31, 2016 President Obama Proclaimed April as National Financial Capability Month. The full text of the proclamation can be found if you click onto or cut and paste the following URL into your web browser

<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>

### Estate & Gift Planning Awareness Month / Week

Founders of The Financial Awareness Foundation approached Congressman's Mike Thompson office with the idea of creating a National Estate Planning Awareness Week Congressional proclamation. After eighteen months of research and work in 2008 Congressman Thompson and 49 bipartisan congressmen and congresswomen co-authored and passed H.Res. 1499, which proclaims the third week in October as National Estate Planning Awareness Week. The full text of the proclamation can be found if you click onto or cut and paste the following URL into your web browser,

<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>

## 2. Local and National Professional Association Contacts

To contact financial, estate, and gift planning professionals and nonprofit professionals in your community, visit

- **American Academy of Attorney-CPAs** – Find an Attorney – CPA
  - [www.attorney-cpa.com/eweb/DynamicPage.aspx?Site=AAA-CPA&WebCode=IndSearch](http://www.attorney-cpa.com/eweb/DynamicPage.aspx?Site=AAA-CPA&WebCode=IndSearch)
- **American Institute of Certified Public Accountants (AICPA)** – Find a CPA –
  - [www.aicpa.org/FORTHEPUBLIC/FINDACPA/Pages/FindACPA.aspx](http://www.aicpa.org/FORTHEPUBLIC/FINDACPA/Pages/FindACPA.aspx)
- **Association of Fundraising Professionals** –
  - Leadership - [www.afpnet.org/](http://www.afpnet.org/)
  - Find a local chapter - [www.afpnet.org/audiences/chapters.cfm?navitemNumber=525](http://www.afpnet.org/audiences/chapters.cfm?navitemNumber=525)
- **Certified Financial Planners (CFP) Board** – Find a CFP Professional –
  - [www.cfp.net/](http://www.cfp.net/)
- **Martindale** – Find a Lawyer or Law Firm –
  - [www.martindale.com/](http://www.martindale.com/)
- **National Association of Estate Planning Professionals (NAEPC)** – Find an AEP or Estate Planner –
  - [www.naepc.org/designations/estate\\_planners/search#spec/AEP,EPLS](http://www.naepc.org/designations/estate_planners/search#spec/AEP,EPLS)
- **National Association of Charitable Gift Planners** –
  - <https://charitablegiftplanners.org/>
  - Find a local chapter <https://charitablegiftplanners.org/council-leaders>
- **Purposeful Planning Institute**
  - <https://purposefulplanninginstitute.com/>



### 3. Research footnotes & links for improving financial awareness & financial literacy

1. The Financial Awareness Foundation
  - a. White Paper - We Have a Lack of Financial Awareness & A Financial Illiteracy Epidemic that Requires Immediate Attention
    - i. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinIlliteracyEpidemic.pdf>
  - b. Spring Improving Financial Awareness & Financial Literacy Report & Magazine™
    - i. <http://www.thefinancialawarenessfoundation.org/pdf/SpringCampaignReport&Magazine.pdf>
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## Improving Financial Awareness Campaigns

To schedule an interview with our distinguished honorary co-chairs, learn more about **The Improving Financial Awareness & Financial Literacy Movement & Campaigns** built around the strategic venues of **Financial Literacy Month & Estate & Gift Planning Awareness Month** and or to receive complimentary financial, estate and gift planning content and a link for your website, contact Valentino Sabuco, Executive Director for The Financial Awareness Foundation at 707.586.8620.

## The Foundation of Personal Financial Knowledge

In the spirit of improving financial awareness and financial literacy here are couple special links we encourage you to explore and you are welcome to share with friends and family, staff and associates.



### The Secrets & Essential Principles of Smart Money the foundation to personal finance knowledge

- **Some Questions to Ponder – Check out your financial literacy**  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Quiz-SomeQuestionsToPonder.pdf>
- **Personal finance doesn't have to be daunting or overwhelming; here's a link to our TFAF- 12 Month Financial Fitness Plan**  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-12MonthFitnessPlan.pdf>
- **Organization & Planning are YOUR KEYS to Financial Success**  
[http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Org&PlanningAreKey-freePubSet.pdf](http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Org&PlanningAreKey-FreePubSet.pdf)
- **We have a big social problem, but there is a realistic solution – Gift Publication Set**  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Flier-Problem-Solution-Gift.pdf>
- **Gift – The TFAF- Personal Finance Publication Set**  
<http://home.thefinancialawarenessfoundation.org/publications.html>



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