Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line
Help Solve A Major Epidemic
While You Take Your Business to New Heights

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

Tactics for Attorneys, CAPs, CFAs, CFP®s, CTFAs, ChFC®s, CLU®s, CPAs, CPA/PFS, Insurance Agents, Private Fiduciaries, Realtors, RIAs, Trust Officers, Wealth Managers and other financial service and nonprofit professionals to share some of your personal financial knowledge, increase your visibility and grow your business, while you help solve the lack of financial awareness and financial illiteracy epidemic.

Key Takeaways
- Families of aging Baby Boomers are transferring more wealth in the next ten years than at any previous time in history.
- An estimated 120 million Americans—perhaps half of the adults in our community—don’t have nor understand why they need to have up-to-date financial, estate and gift plans to protect themselves and their families.
- Think “family office” for small and aspirational clients—it’s not just for the ultra-wealthy
- Take an active leadership role in The Improving Financial Awareness & Financial Literacy Movement

We live in one of the most exhilarating times in the annals of all mankind. However there are many challenges to attracting, retaining and growing satisfied clients / donors / patrons on the path to building a successful practice.

The following outlines a significant business opportunity for you – the elite financial advisors, nonprofit professionals and charitable gift planners - to advance your business by attracting motivated and primed clients, while helping to grow a strong financially sound domestic and international economy.

The Big Challenge
Managing personal finances today is more complicated, time consuming, and more important than ever. We are living longer, but saving proportionately less. We feel less secure in our jobs, homes, and overall outlooks than previous generations did. We watch, helplessly, as our money evaporates due to exorbitant costs of housing, taxes, education, health care and life’s too many “unexpecteds.” Many clients and prospects worry about the future, or unfortunately in many cases, they simply try not to think about it. Until “it” happens—a financial catastrophe which could have been avoided by some advanced planning.

Most people are not taught the essential principle to smart personal financial management – the foundation to personal finance knowledge - at home or in school, thus they don’t have the proper tools to address every day money decisions in an informed manner. This jeopardizes their financial and physical wellness, their ability to realistically achieve and maintain their personal and financial dreams, let alone enjoy a financially secure debt free future.
Many people don’t realize that

- The majority of the adults in the US that reach the age of 70 are almost out of money, but have life expectancies well into their mid-80’s and maybe into their 90’s. **That’s disastrous.** Who will be responsible for them? The choices are few, family and friends, employers, nonprofits and people with money, and the government as a final safety net.

- Over 120 million adults, 50% of our adult population don’t have nor understand why they need a current financial, estate and gift plans to protect themselves and their assets in the event of sickness or when they pass away. This is a real problem, as most feel they don’t have an estate to plan for; this is **NOT TRUE.** Financial, Estate & Gift Planning is not just for the wealthy and elderly; it’s important for everyone.
  - If people don’t have an estate plan there asset may not pass to their desired party, and there is no way for their significant or modest assets to get to their favorite charities or causes, as asset then pass by title, beneficiary designation, and the state laws of intestate succession which by default goes to close then distant family, if none exist they then revert to the state of domicile after taxes and costs.
  - Can you believe that Prince and Aretha Franklin would pass with no wills or estate plan?? What could Prince and Aretha Franklin estates of $400+ million do in the right hands? Music scholarships, teach entrepreneurship, help advance cures for health problems, help feed many, improve financial awareness and financial literacy, etc.

**Note:** Rich, poor or somewhere in between--that’s about half the adults in your hometown: many prospects that need your assistance and are able to pay for your expertise.

- Too many young people and their families are burdened with excessive education debt and other forms of debt. Student loan debt exceeds $1.3 trillion and is the **2nd largest class of consumer debt after mortgages; members of the class of 2016 graduated with an AVERAGE of $37,000 in student loan debt.** Those with graduate degrees are significantly greater.

- The Consumer Financial Protection Bureau 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 quite alarming:** People are making critical life decisions based on information gained from non-experts and fragmented sources.

- We have entered into the greatest wealth transfer in history. An estimated $59 trillion - divided among heirs, charities, estate taxes and estate closing costs – is being transferred from 116 million American households from 2007 to 2061 as reported by John J. Havens and Paul G. Schervish from the Center on Wealth and Philanthropy Boston College.

- Without some financial and estate planning a significant amount of these assets will be wasted; much of the remaining assets may not go to the right person(s) or organization(s), and or may not be used as intended.

- However, this huge wealth transfer is not for all families, many will run out of money long before passing.

- This is not just a domestic challenge it is an international one.

Many people mistakenly believe they’re not “rich,” and assume they don’t need financial, estate or gift plans – **NOT SO.**

**Note:** **This attitude can be very harmful financially and can be avoided with some education and proactive actions.**

The majority of Americans over 65 are totally dependent on their Social Security checks.

**Note:** **With proper knowledge, motivation, and planning, future generations can have a more secure future; think “family office” for your midsize and aspirational clients.** The typical definition for “Family Office” clients is in excess of $50 million. However, if you can talk with your smaller and aspirational clients about combining several generations of their families to work together, then your can increase the size of your client base, while retaining and helping to manage those assets more efficiently than you would by keeping them as individual clients.
A Solution and Master Plan
Managing personal finances today is more complicated, time consuming, yet more important than ever. We are living longer, but saving proportionately less. We feel less secure in our jobs, homes, and overall outlooks than previous generations did. We watch, helplessly, as our money evaporates due to exorbitant costs of housing, taxes, education, health care and life’s too many “unexpecteds.” Many clients and prospects worry about the future, or unfortunately in many cases, they simply try not to think about it. Until “it” happens—a financial catastrophe which could have been avoided by some advanced planning.

Most people are not taught the essential principle to smart personal financial management – the foundation to personal finance knowledge – at home or in school, thus they don’t have the proper tools to address every day money decisions in an informed manner. This jeopardizes their financial and physical wellness, their ability to realistically achieve and maintain their personal and financial dreams, let alone enjoy a financially successful secure debt free future.

Staying organized and planning wisely are keys to financial success. As you know short of winning the lottery or inheriting millions, few people attain and maintain financial success and security without forethought, a strategy, and ongoing management. Learn this powerful simple process to make better everyday money decisions so you have the best chance of watching your personal and family dreams become a reality.

http://home.thefinancialawarenessfoundation.org/publications.html

To help address the lack of financial awareness and the financial illiteracy epidemic 12 years ago we began taking an active leadership role to recognize organizations and their management, and individuals that are championing improving financial awareness and financial literacy. We unite them with other associations, organizations, nonprofits, educational institutions, municipalities, employers, and news media to actively focus this vast community resource 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
  In 2004 the Senate passed Resolution 316 officially recognizing April as National Financial Literacy Month. In 2011 President Obama signed a Presidential Proclamation deeming April as National Financial Literacy Month. In 2019 President Trump proclaimed April as National Financial Capability Month

- Estate & Gift Planning Awareness Month (October)
  In 2007 and 2008 we worked with Congressman Thompson’s Office to help create an Estate Planning Awareness proclamation that was co-authored by 50 bi-partisan Congresswomen & Congressmen and passed H.Res. 1499, which officially made the third week in October National Estate Planning Awareness Week.

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 a current financial, estate and gift plans.

We understand that this is a massive undertaking; but as we move into the 12th year of the Improving Financial Awareness & Financial Literacy Movement it’s being accomplished through thought leading financial service, nonprofit, and charitable gift planning organizations and their professionals, educational institutions, municipalities, employers, the news media, and other concerned organizations and individuals.
Below is a link to the Improving Financial Awareness & Financial Literacy Movement Report & Magazine. This report provides a broad picture of the lack of financial awareness and financial illiteracy epidemic, an overview of the strategy behind the movement and campaigns, and a sampling of the community participation, including supporting proclamations from 22 state governors.

Click on this link to open your copy


You also won’t want to miss seeing the section on Recent Financial Awareness & Financial Literacy Reports, Educational Initiatives, The International Section and so much more.

You are welcome to circulate this among your colleagues.
The Improving Financial Awareness & Financial Literacy Movement Distinguished Co-Honorees for 2020

Each year we recognize and honor a distinguished group of hard working ‘Thought Leaders’ for their outstanding individual efforts in improving financial awareness and financial literacy. It gives us great pleasure to recognize this year’s Co-Honorees representing Thought Leadership in Academia, Financial Services, News Media and Nonprofits are

Representing Academia Thought Leadership
The International Improving Financial Awareness & Financial Literacy Research Center at Makerere University – Kampala Uganda

Dr. Winston Tumps Ireta, Chairperson / Counselor
http://governance.mak.ac.ug/university-council

Dr. David Ddumba, Founding Executive Director / CEO
http://math.mak.ac.ug/node/106

Dr. Juma Kasozi, Vice Executive Director
http://math.mak.ac.ug/Juma-Kasozi

Ammex Ssebidde, Founding Chief Operating Officer (COO), Alumni Makerere University, Executive Director – Mercy-Giving
https://www.mercy-giving.org/

Over the last year these fine gentlemen have been working on creating The International Improving Financial Awareness & Financial Literacy Research Center at Makerere University – Kampala Uganda. The Research Center will be taking a leadership role in rolling out

- The Improving Financial Awareness & Financial Literacy Movement in Uganda
- The Improving Financial Awareness & Financial Literacy University Program at Makerere University

Representing Financial Services Thought Leadership
https://www.aboutschwab.com/carrie-schwab-pomerantz

Carrie Schwab-Pomerantz, Board Chair and President, Charles Schwab Foundation, Senior Vice President, Charles Schwab & Co., Inc. & Board Chair, Schwab Charitable

Carrie Schwab-Pomerantz, CFP®, is a leading advocate for financial literacy and one of America's most trusted sources for financial advice. She has devoted her career to helping men and women from all walks of life achieve financial security. In addition, she oversees Schwab's corporate philanthropy and employee volunteer programs, which aim to strengthen the communities where Schwab operates.

Representing News Media Thought Leadership
https://www.leimberg.com/about/SteveLeimberg.html

Stephan R. Leimberg, CEO of Leimberg and LeClair, Inc.,

Stephan R. Leimberg is CEO of Leimberg and LeClair, Inc., an estate and financial planning software company and publishing and software company in Bryn Mawr, Pennsylvania. Stephan is also the Publisher of Leimberg Information Services, Inc. which provides e-mail based news, opinion, and information for tax professionals, and the author of numerous books on estate, financial, and employee benefit and retirement planning and a nationally known speaker.

Representing Nonprofit Thought Leadership
https://www.azecon.org/our-team.html

Elena Zee is President and CEO of the Arizona Council on Economic Education

Elena is very passionate about education, professional development, economic empowerment, and international exchange. She is also a Certified Financial Planner™ and has taught financial planning and economics at universities. The Arizona Council on Economic Education (ACEE), a 501(C)(3) nonprofit dedicated to improving economic and personal financial literacy in Arizona, serves over 1,800 schools across 104 cities in Arizona.
## Fun & Easy Ways to Help Make a Difference - Checklist

We’ve assembled the following collection of tools to assist you, your branch office(s), your council(s) and chapter(s) to help to get this important message out to other leaders to support and to actively participate in *The Improving Financial Awareness & Financial Literacy Movement & Campaign* and programs.

### Fun & Easy Tasks

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<th>Yes I can Do that</th>
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<tr>
<td>Sample Estate Planning Article (.pdf)</td>
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<td>Graphic for Estate Planning Article (.jpg)</td>
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<td>Sample Estate Planning Article-Text (.docx)</td>
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<tr>
<td>Sample Financial Planning Article (.pdf)</td>
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<tr>
<td>Graphic for Financial Planning Article (.jpg)</td>
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<td>Sample Financial Planning Article.docx</td>
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### Fun & Easy Tasks

1. **Place financial and estate and gift planning editorial content** within your websites, newsletters, social media groups, local newspapers, and radio/television/web-based shows, in support of **Financial Literacy Month** and **Estate & Gift Planning Awareness Week**. If you need content please contact us or see the sample articles at the links below

   - Sample Estate Planning Article (.pdf)
   - Graphic for Estate Planning Article (.jpg)
   - Sample Estate Planning Article-Text (.docx)
   - Sample Financial Planning Article (.pdf)
   - Graphic for Financial Planning Article (.jpg)
   - Sample Financial Planning Article.docx

2. **Add the We Support Improving Financial Awareness & Financial Literacy Co-Branded Icon** to your website with a link to [http://home.thefinancialawarenessfoundation.org/campaigns.html](http://home.thefinancialawarenessfoundation.org/campaigns.html)

   - Co-Brand by placing your logo here

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Here’s a link to download the Foundation graphic


Here’s a link to download the Co-Brandable graphic

[http://www.thefinancialawarenessfoundation.org/pdf/Co-brand-IFAFL-Bl-Graphic.jpg](http://www.thefinancialawarenessfoundation.org/pdf/Co-brand-IFAFL-Bl-Graphic.jpg)
3. 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.


4. Encourage your organization and associates to host or take part in national or community-wide programs or provide one for your employees and customers built around estate and financial planning during the months of April and October in support of improving financial awareness and financial literacy. If you need help or ideas with these programs, or scripted programs please contact us.

We have successfully piloted ‘no-cost’ community programs like what the City of Monterey and its Public Library (The oldest in California) are doing for their patrons and the Greater Monterey Bay Area Residents as a Community Gift.

http://www.monterey.org/library/Events/Financial-Awareness-Workshops

We can work with you to do something like this with and for your organization. We have scripted public presentations for you that you can be easily customized and branded that are entitled

- “Building Blocks to Successful Financial Planning”
- “Building Blocks to Successful Estate & Gift Planning”

5. Circulate this communication to colleagues and associates and encourage them to support and actively participate in The Improving Financial Awareness & Financial Literacy Movement & Campaigns & programs. Click below to download the Improving Financial Awareness & Financial Literacy Movement Programs Overview / Planner that can be found at http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf

For the financial service and nonprofit professionals - How Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line


6. Provide local seminars and workshops. Encourage your local
- Financial Planning Association Chapter
- Estate Planning Council
- National Association of Charitable Gift Planners
- Association of Fundraising Professionals Chapter
- International Association of Advisors in Philanthropy Chapter
- Society of Financial Service Professionals Chapter
- Nonprofits

and their financial professional associates to join in with you to host or take part in community-wide programs built around personal financial and estate planning during the months of April and October in support of improving financial awareness and financial literacy.
### Fun & Easy Tasks

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<th>Yes I can Do that</th>
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<tr>
<td>7. Invite one of our speaker bureau members to address your conference, event, and meetings on the Importance of Improving Financial Awareness &amp; Financial Literacy for your organization. Or become a speaker bureau member to address conferences, events, and meetings on the Importance of Improving Financial Awareness &amp; Financial Literacy.</td>
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<td>8. Help create some fun improving financial awareness &amp; financial literacy challenges</td>
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<tr>
<td>- As to who has the best Financial Awareness</td>
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<td>- Community Activity</td>
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<td>- Checklist</td>
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<td>- Article</td>
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<td>- Campaign Slogan</td>
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<td>- Wrap Songs</td>
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<td>- Campaign Flyer</td>
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<td>- Website</td>
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<td>- Other possibilities?</td>
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<td>- As to who has the most financially literate</td>
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<td>- Chapter / Council</td>
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<td>- Employees</td>
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<td>- Members</td>
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<tr>
<td>- City</td>
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<td>- State</td>
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<td>9. Financially support these amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy by reallocating existing marketing dollars and or adding new dollars to these important biannual campaigns.</td>
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<td>10. 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</td>
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<tr>
<td>- Financial Literacy Month (April)</td>
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<tr>
<td>- Estate &amp; Gift Planning Awareness Month (October)</td>
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<tr>
<td>This is usually an online form that’s easy to complete. Here’s a link to a sample proclamation</td>
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<td>Do the same with your Congressmen / women, and with local Mayors &amp; City Council Members</td>
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<td>11. 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.</td>
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<tr>
<td>12. Make contributions of your time, creativity, strategic planning, goodwill, contacts where appropriate, staff time. If you have available staff time available to let us know and make some it available for our worthy projects.</td>
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<tr>
<td>13. Help us with our fundraising and capital campaigns.</td>
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<tr>
<td>- More than ten years of planning and thousands of volunteer hours have gone into developing the strategic plans and the foundation's infrastructure along with the initial <em>Improving Financial Awareness &amp; Financial Literacy Movement</em> and campaigns, content and other intellectual properties.</td>
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<tr>
<td>- Up to now The Foundation’s executive team, Board, Ambassadors and the various associates are entirely a volunteer team. The Foundation has grown to the stage that it requires ongoing “hands-on” management to strategically plan, implement and manage its relationships, programs and initiatives.</td>
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<td>Fun &amp; Easy Tasks</td>
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<td>• Our capitalization goals are to raise $10 million to properly capitalize The Foundation to advance and support our campaigns and programs. We are seeking lead philanthropists and / or sponsors who see the importance of our mission and appreciate our accomplishments to-date and who will assist us by initially capitalizing us with $1 million each along with other appropriate resources. Help us to identify and make contacts with possible philanthropists and strategic partners that can assist us on our mission.</td>
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<tr>
<td>• Start by making a charitable contribution to us today <a href="http://home.thefinancialawarenessfoundation.org/donationgateway.html">http://home.thefinancialawarenessfoundation.org/donationgateway.html</a></td>
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<td>• Your timely financial and strategic support is requested to help us take our initial work to the next level.</td>
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<td>14. We are looking for additional</td>
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<td>• Strategic partners</td>
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<td>• Sponsors</td>
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<tr>
<td>• Volunteers and supporters and Ambassadors</td>
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<tr>
<td>• Philanthropists &amp; donors</td>
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<tr>
<td>• Distinguished Co-Honorary Chairs for The Improving Financial Awareness &amp; Financial Literacy Movement</td>
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<td>• Board Members</td>
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<td>to help with our capital campaign and improving financial awareness and financial literacy campaigns and programs. When they appear introduce them to us.</td>
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<td>15. Introduce others to our “No-Cost” programs</td>
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<td>• Help us introduce the Financially Green Organization Certification Program™ to employers, member based organizations, high schools, colleges and universities, and municipalities. See the notes above Check out our overview through this link <a href="http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf">http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf</a></td>
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<td>• The Your financial PARTNER University / College Program™ Check out our overview through this link <a href="http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf">http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf</a></td>
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<td>16. Help us with our technology needs</td>
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<td>• Website</td>
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<td>• The Financial Knowledge Community</td>
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<td>• Public Portal</td>
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<td>• Nonprofit Portal</td>
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<td>• Financial Service Professional Portal</td>
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<td>• CRM</td>
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<td>• Content Management Systems</td>
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<td>• Project Management Systems</td>
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<td>• eLearning Platform</td>
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<td>• Video Development &amp; Production</td>
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<td>17. Help establish The Movement in a New Country</td>
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<td>• Your country if it doesn’t have one and if it does join in an help advance it</td>
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<td>18. Help us establish The International Improving Financial Awareness &amp; Financial Literacy Research Center at University / College Campus near you.</td>
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<td>• Advance research projects</td>
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<td>• Serve as a Think Tank</td>
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<td>• Provide classes, workshops, and conferences</td>
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<tr>
<td>• Advance our personal and professional publishing activities</td>
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<td>• House The Financial Awareness Foundation</td>
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### Fun & Easy Tasks

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<th>Yes I can Do that</th>
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<th>19. What are some other ideas that you might have?</th>
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**Notes:**

Please join us and the leading financial and nonprofit associations, companies, and their professionals; nonprofits, educational institutions, larger employers, membership based organizations, technology companies, government agencies, and the news media on this important initiative. **Together we have the potential to help solve a major social challenge** by advancing and contributing to one of the most amazing, broad-based, multifaceted movement for improving financial awareness and financial literacy.
Who Benefits From This Undertaking?
What a great opportunity for you to create goodwill and new revenue opportunities while performing a very important and valuable community service.

- **You benefit** by supporting and actively participating in The Improving Financial Awareness & Financial Literacy Movement & Campaigns by being recognized as a thought leader that is significantly helping to solve a major social problem. This will create goodwill for you and your organization that will attract new patrons, retain existing ones, and build support for your own other initiatives.
- **You, your staff, 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.
- **Your and other families** benefit by learning the essential principles to smart money; it empowers them to make better informed productive everyday money decisions, save time and money with their financial advisors and product providers, and have the best possibilities to reach and maintain their personal and family financial dreams, to enjoy a financially secure, debt-free future, while passing on their values, knowledge and assets to future generations to make their lives and this world a better place.
- **Financial service professionals and their organizations**, such as attorneys, accountants, bankers, trust officers and private fiduciaries, realtors, insurance brokers and agents, investment brokers and agents, wealth managers, financial advisors, benefit by acquiring new business from more informed and motivated clients.
- **Employers** benefit from having employees who are less financially stressed, happier and more productive.
- **Municipalities** benefit by having happier and financially successful constituents, and a reduced strain on social welfare services.
- **Nonprofits and fundraisers** benefit their organizations with increased donations, planned gifts, alternate beneficiary selections and bequests.
- **Philanthropists** benefits by helping to solve a major social problem that leads to a better world.
- **Universities and Colleges** benefit by having alumni, faculty and staff who are less stressed, happier and more productive and more philanthropic with increased donations, planned gifts, alternate beneficiary selections and bequests. This opens the door to significant development opportunities for Universities and Colleges to reduce education costs and fund student scholarships, faculty grants, research and other projects through outright gifts, lifetime structured gifts, primary and alternate beneficiary selections, bequests and deferred gifts that are a part of The Community member’s financial, estate and gift plans.
- **The news media** benefits by providing its audience with timely valuable information.
- **Everyone actually benefits with a stronger and financially sound economy.**

*Do you have strategic relationships with major employers, social media & technology companies, nonprofits, universities and colleges that should know about The Movement and Campaigns? If so please share this with them.*

In Summary
We welcome your active support and participation in the Improving Financial Awareness & Financial Literacy Movement & Campaigns; together we have the potential to help solve a major social challenge by advancing and contributing to one of the most broad-based, multifaceted moments for improving financial awareness and financial literacy while advancing philanthropy.

If you or someone you know are looking for a good cause to get involved with or have some time to share please consider becoming a TFAF Ambassador, Strategic Partner or Volunteer.

Stay safe and healthy – there’s lots of work to do!!!! - wishing you, your family and colleagues all the very best, ALWAYS

**Valentino**

*Valentino Sabuco, Executive Director*

We believe having better personal finance knowledge changes your world and the world around you… FOREVER!
About The Financial Awareness Foundation

The Financial Awareness Foundation, (TFAF), is a 501(c)(3) nonprofit organization. TFAF serves as a nonpolitical “financial awareness advocate” for The People - the general public, financial service and nonprofit professionals and their organizations, educational institutions, municipalities, employers and the news media. Our mission is to significantly help solve a major social problem by dealing with the lack of financial awareness and financial literacy. We believe that teaching financial awareness, financial literacy and the essential principles to smart money management are very important as this gives people the tools of empowerment to:

- Make better informed everyday money decisions so you can
  - Life a quality life without outliving your wealth
  - Watch your personal / family dreams become a reality
  - Make decisions about your lifestyle without financial worry
  - Enjoy a financially secure debt free future

- Work with financial professionals & product providers to get the best results from their time & money
- Pass on their values, knowledge & assets to future generations to make their lives & this world a better place

The Financial Awareness Foundation has two main focal points and they revolve around:

1. Taking an active leadership role to recognize organizations and their management that are championing improving financial awareness and financial literacy. We are then uniting them with other associations, organizations, nonprofits, educational institutions, municipalities, employers and the news media to actively focus their vast community resources into The Improving Financial Awareness & Financial Literacy Movement & Campaigns - a growing concentrated personal finance content media blitz every six months through the strategic campaign venues of
   - Financial Literacy Month (April)
   - Estate & Gift Planning Awareness Month (October)

   The plan is to touch the majority of the general public, high net worth individuals, financial service and nonprofit professionals and their organizations at least twice a year through these strategic venues, with educational and motivating reminders to get and keep their financial, estate, and gift plans in order.

2. The Foundation 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.

Organizations and individuals are not required to financially support The Financial Awareness Foundation in any way. They do not pay any marketing or membership fee, or make a contribution in order to participate in this important improving financial awareness and financial literacy movement, campaigns and programs. And we develop and distribute high quality materials at ‘NO Cost’. But as a 501(c)(3) nonprofit financial support and contributions are always welcomed and very much appreciated.
For further background on us, The Improving Financial Awareness & Financial Literacy Movement & Campaigns.

**The Financial Awareness Foundation**

1. Our Introduction 1 minute video and website
   [http://www.thefinancialawarenessfoundation.org](http://www.thefinancialawarenessfoundation.org)
2. The Financial Awareness Foundation Fact Sheet
3. The Financial Awareness Foundation Introduction
   [http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf](http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf)
4. IRS Determination Letter

**The Improving Financial Awareness & Financial Literacy Movement & Campaigns**

2. The Improving Financial Awareness & Financial Literacy Movement Program Planner / Overview
3. Serving as an Ambassador or Volunteer

**TFAF Improving Financial Awareness & Financial Literacy Programs**

1. The Financially Green Organization Certification Program™ Executive Summary & Overview
2. The *Your financial PARTNER University / College Program™ Executive Summary & Overview*

**The TFAF Personal Finance Publications Set – it’s Complimentary 😊**

Here is a link to download the TFAF - Personal Finance Publication Set. In the spirit of improving financial awareness and financial literacy you are welcome to share them with family and friends, staff and business associates as you see appropriate. These can also be cobranded with participating organizations and delivered as ebooks or 4 color printed hardcopies.

[http://home.thefinancialawarenessfoundation.org/publications.html](http://home.thefinancialawarenessfoundation.org/publications.html)

Here’s a brief summary of this very special personal finance publication set

1. *Your financial PARTNER™ Overview – Essential Principles to Smart Money Management™* This publication provides the reader with an overview of the *Your financial PARTNER Personal Financial Management System* and also identifies the essential principles to smart money management and common mistakes to avoid – the foundation to personal finance knowledge - and places them at your fingertips.

2. *Your financial PARTNER™ – The Personal Financial Management System, Guidebook and form set -* This is more than just another source of financial information and advice. It’s a complete personal financial management system - a clear step-by-step process designed to help organize your affairs and provides you with the essential principles to smart money management and a comprehensive set of common mistakes to avoid. These special tools empower you to
   - Make better everyday money decisions
   - Enjoy a financially secure debt-free future
   - Live a quality life without outliving your wealth
   - Save time and money on financial matters
   - Have the peace of mind you are making the right money decisions for you and your family
   - Work better with your financial advisors and financial product providers
   - Pass on values, knowledge & assets to future generations to make their lives & the world a better place

3. *Your Estate & Gift Planning Organizer™* – All the tools you need to better organize, plan and manage your estate plan over your lifetime. Helps you develop and maintain a sound estate plan for you and your family. Organizing financial information is challenging for most of us. *Your Estate & Gift Planning Organizer* streamlines the estate planning process, helping you prepare your estate plan in a quick and easy manner saving you time and money.
TFAF Research & White Papers

1. White Papers - We Have a Lack of Financial Awareness & Financial Illiteracy Epidemic that Requires Immediate Attention
2. Wealth Advisor Confidence Survey – Executive Summary
3. TFAF- Improving Financial Awareness & Financial Literacy Background Resources
   http://home.thefinancialawarenessfoundation.org/pdf/9-BackgroundResources.pdf
5. TFAF- Key Financial Literacy Definitions

International

1. The East Africa Movement
   http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Africa-TIFA-FLM.pdf
2. The Improving Financial Awareness & Financial Literacy Movement in Uganda
3. The Improving Financial Awareness & Financial Literacy Movement in Kenya
4. The Improving Financial Awareness & Financial Literacy Movement in Tanzania
5. The Improving Financial Awareness & Financial Literacy Movement in Ghana

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

We will support improving financial awareness & financial literacy movement in the USA

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http://home.thefinancialawarenessfoundation.org/donationgateway.html

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