

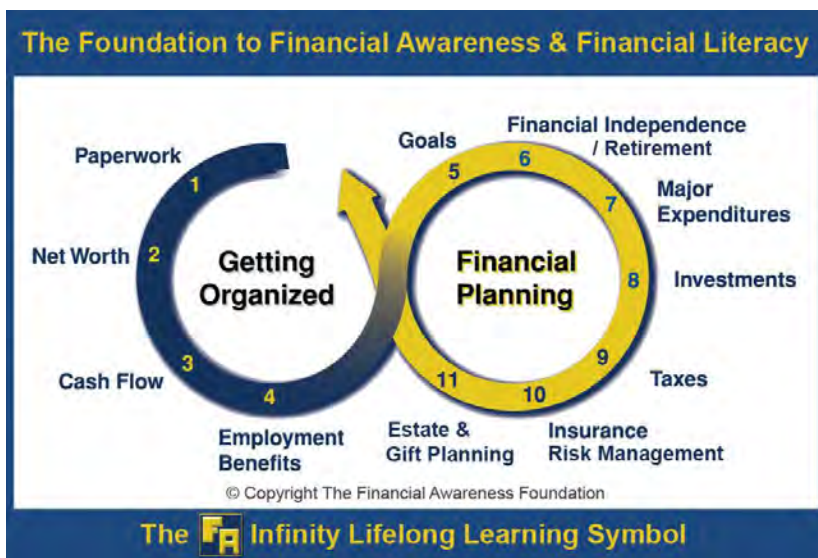
The TFAF Building Blocks to Successful Financial Planning Presentation Series & Curriculum

We have four dynamic and powerful 90 minute scripted PowerPoint presentations, which can be accompanied by our **TFAF Personal Finance Publication Set**, to provide the viewer with a memorable lifelong learning experience. They have been used domestically and internationally as content for classroom interaction, webinars and conferences, regional and community workshops, and as in house employee and member benefits as improving financial awareness and financial literacy programs. They are entitled

- ❖ **#1 - Introduction to**
 - ◆ **The Improving Financial Awareness & Financial Literacy Movement, and**
 - ◆ **The Building Blocks to Successful Financial Planning Presentation Series – Rethinking Personal Finances**
- ❖ **#2 & #3 - Building Blocks to Successful Financial Planning**
 - ◆ Part 1 – Getting Organized
 - ◆ Part 2 – The Essential Principles
- ❖ **#4 - Building Blocks to Successful Estate & Gift Planning**

Our presentations aim to improve the viewers financial lifestyle by providing an easy-to-use, systematic approach to personal financial management, introduce the viewer to the secrets of smart money and the Essential Principles to Smart Personal Money Management – the foundation to personal finance knowledge. The presentations are designed to provide the viewers with a very important 'life skill. most often not taught in home and school. The presentations **empower the viewer** to:

- Make wiser informed lifelong money decisions
- Work more efficiently with financial professionals & product providers to get the best results from time & money
- Get and keep their financial house in order by having a current financial, estate and gift plans
- Pass on values, knowledge and assets to future generations, and charitable causes, to help make this a better world
- Have the highest probability to reach and maintain their family dreams while living out a financially successful life.



The FINANCIAL AWARENESS Foundation

A 501(c)(3) Nonprofit Organization Dedicated to Significantly
Improving Financial Awareness & Financial Literacy...TM

959 Golf Course Drive, #273 ♦ Rohnert Park ♦ Sonoma County ♦ CA 94928 - (version 070721)

© Copyright The Financial Awareness Foundation ♦ www.TheFinancialAwarenessFoundation.org ♦ 707.586.8620

See How Others Presented TFAF Presentations

The Monterey Public Library
Endowment Committee and
Friends of the Library
in Partnership with The Financial
Awareness Foundation present

A SPECIAL GIFT TO THE COMMUNITY

Supporting the Financial Awareness and Financial Literacy Movement
October is National Estate Planning Month

Building Blocks to Successful Financial Planning
Part 1: Getting Organized
Wednesday, October 4 • 6:00–8:00pm

Building Blocks to Successful Financial Planning
Part 2: Essential Principles
Wednesday, October 11 • 6:00–8:00pm

Building Blocks to Successful Estate Planning
Wednesday, October 18 • 6:00–8:00pm

Monterey Public Library Community Room

Adults are invited to attend.
Admission is free. Reservations required.
Hors d'oeuvres will be served.
Call (831) 646-5632 or
email thongchu@monterey.org



PLANNING for the FUTURE


We want to motivate, educate, and empower you to improve your future financial lifestyle by providing you with the essential principles to smart personal financial management, common financial mistakes to avoid, and an easy-to-use, systematic approach to personal financial management.

Expert Speakers

 Ottobler A. Cibarrilla AIF, CFP® Partner, Monterey Private Wealth	 Julie King, Esq. Pierce King, P.C. A Professional Law Corp.
 Laura A. Davis, Esq. Law Offices of Laura A. Davis	 Kevin R. Mahoney CFP® Partner Integrative Wealth Management, LLC
 Byrce Hamilton Partner & Co-Founder Vestor Group Wealth Management	 Kris Tasciano CPA Partner Hayashi Wayland
 Lisa D. Horvath CTFA, AIF President & CEO Monterey Trust Management	 Mark Williams Managing Partner & Co-Founder Vestor Group Wealth Management

All attendees will receive a complimentary set of personal finance publications. This powerful resource gives you and your loved ones the gift of personal financial knowledge* to help make your dreams a reality.

Monterey Public Library • 825 Pacific Street • Monterey, CA 93940 • monterey.org/library
The Financial Awareness Foundation • a 501(c)(3) non-profit • thefinancialawarenessfoundation.org



Welcome

A New Organization on Campus

The International Improving Financial Awareness & Financial Literacy Association at UGBS (The FA Association)
<http://ugbs.ug.edu.gh/association>


A SPECIAL GIFT TO ALL UG STUDENTS
Join us for an 'Edutaining Presentation'

Date: 26th & 27th March, 2021 Time: 4:00 pm - 5:30 pm
All University Students are invited to attend Admission is free

Zoom ID: 759 837 1756 Password: TFAF For enquiries
Contact Bless Deloli - 0555250393 Wendy Fosu - 0547852291

The Movement







The Improving Financial Awareness & Financial Literacy Movement in Ghana
<http://ugbs.ug.edu.gh/movement>




Rethink


PERSONAL FINANCE KNOWLEDGE

Distinguished Presenters


	Professor Justice Nyigmah Bawole Dean of the University of Ghana Business School
	DR. Benjamin Amoah FA Associate Coordinator Lecturer
	Dr. Edwina Ashe-Nikoi FA Associate Coordinator
	Mr. Peter Kwadwo Asare Nyarko Executive Director, CFLE-Africa
	Mr. Valentino Sabuu Executive Director, The Financial Awareness Foundation, USA
	Miss Miriam Arthur FA Association Student Executive President



**UNIVERSITY OF GHANA
BUSINESS SCHOOL**



**CENTRE FOR FINANCIAL LITERACY
EDUCATION AFRICA**
Lead TFAF Ambassador—Ghana



The Financial Awareness Foundation

We believe that that improving financial awareness & financial literacy changes your world & the world around you, FOREVER!

Sample Slide-Decks

Here are two sample slide decks from our Presentation #1; the first one from **USC** and the second from **The International Improving Financial Awareness & Financial Literacy Association (The FA Association)** at the University of Ghana for Axis Pension's Employees

In the Spirit of Improving Financial Awareness & Financial Literacy
Welcome and Introduction



- KLS Legacy Foundation
- USC Emeriti Center & College
- The Improving Financial Awareness Foundation
- The Improving Financial Awareness & Financial Literacy Movement
- Building Blocks to Successful Financial Planning Series

The Foundation to Personal Finance Knowledge





In the Spirit of Improving Financial Awareness & Financial Literacy....
A SPECIAL GIFT TO THE AXIS PENSIONS GROUP EMPLOYEES



- Greetings & Introductions
- COVID-19 EXPERIENCE – A Call to Rethink Personal Finances
- Building Blocks to Successful Financial Planning Series
- The Improving Financial Awareness & Financial Literacy Movement

The Foundation to Personal Finance Knowledge



<http://www.thefinancialawarenessfoundation.org/pdf/DraftSlides1of4.TFAF-KLS-Emeriti-BBSFP-Intro-2020.pdf>

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FAAssociation-CFLE-AxisPensions-Intro1of4-Slides.pdf>



The FINANCIAL AWARENESS Foundation

A 501(c)(3) Nonprofit Dedicated to Significantly *Improving financial awareness & financial literacy*™ Page 2

Our presentation are also be very flexible and can be branded and customized. With appropriate editing adjustments, the **TFAF Presentation Set** can generate several presentation formats and lengths to accommodate different time slots and audiences.

Each presentation can start with a brief opening and closing comments from an organizational dignitary, and a few housekeeping comments from an announcer would be ideal. And close with a question and answer (Q & A) with closing comments by the Moderator or a presenting host dignitary.

The ideal audiences for these presentations includes

- High School Students and Above
- Primary or Secondary or College Teachers, Professors, Lecturers and Administrators
- Graduating Class
- Alumni Groups
- Employee Groups
- Nonprofit organizations
- Service Clubs
- Young Professionals
- Female Groups
- Male Groups
- Retirees
- Soon to be Retirees
- Municipality and Community Leaders, Politicians, and Law Makers
- Other Associations & Special Interest Groups

These valuable presentations venues can be in classrooms, webinars, workshop, community offering, that can be recorded and presented on demand, or as part of a radio, television or PBS broadcast.

You can use this presentation anytime of the year, and can be offered in support of The Improving Financial Awareness and Financial Literacy Movement during the strategic campaign venues of

- **April being known as Financial Literacy Month**, and six months later as
- **October being known as Estate & Gift Planning Awareness Month**

These presentations are also designed to use **The Financial Awareness Foundation's** complimentary – **TFAF Personal Finance Publication Set** as a syllabus and audience gift takeaway tool, but it is not required.

With advanced notice **The Financial Awareness Foundation's** materials can be co-branded with partnering organization's branding and contact information. You can download a complimentary copy by clicking on this link



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



Further, if you are seeking a comprehensive curriculum you may wish to consider using the actual **Your financial PARTNER Guidebook** and sharing the presentations around this as a 14 Module Series, or expanded or contracted as the scheduling permits. This can also be recorded by financial service professionals and viewed on demand; then followed up with live in person / online workshops, or individual coaching / planning sessions with qualified professionals.

As you can see from the following table of contents it follows the **The FA Infinity Lifelong Learning Symbol** and elements nicely, providing the viewers with a valuable and often overlooked life skill.



Your financial PARTNER Table of Contents

Action Forms Directory.....	vi	<input type="checkbox"/> Getting to the Big Issues.....	34
Preface.....	ix	<input type="checkbox"/> An Overview of the Schedules.....	35
Some Questions to Ponder.....	xi	<input type="checkbox"/> Net Worth Statement.....	36
Introduction: Welcome to <i>financial</i> PARTNER.....	1	<input type="checkbox"/> Inventory Your Assets.....	40
<input type="checkbox"/> Do I Need a Lot of Money to Make Planning Worthwhile?.....	2	<input type="checkbox"/> List Your Liabilities.....	63
<input type="checkbox"/> What About the Things I'm Already Doing?.....	2	<input type="checkbox"/> Determine Your Net Worth & Track Your Progress.....	70
<input type="checkbox"/> Getting Acquainted.....	3	<input type="checkbox"/> Let's Review the Essential Principles.....	73
<input type="checkbox"/> How Do I Begin?.....	3	CHAPTER 3: Gain Control of Your Cash Flow.....	75
<input type="checkbox"/> Look for <i>financial</i> PARTNER Icons.....	4	<input type="checkbox"/> Finding the Balance That Works for You.....	75
<input type="checkbox"/> How Is <i>financial</i> PARTNER Organized?.....	4	<input type="checkbox"/> Common Mistakes to Avoid.....	76
<input type="checkbox"/> Planning for Life.....	6	<input type="checkbox"/> A Preview of What You Will Be Doing.....	76
<input type="checkbox"/> An Answer, and a Beginning.....	6	<input type="checkbox"/> Cash Flow Management System.....	76
<input type="checkbox"/> Registration.....	7	<input type="checkbox"/> Ways to Increase Savings.....	80
<input type="checkbox"/> The Future Starts Right Now.....	9	<input type="checkbox"/> Debt Reduction Strategies.....	85
Part I — Getting Organized.....	11	<input type="checkbox"/> Create & track Your Cash Flow Plan.....	85
CHAPTER 1: Organizing Your Paperwork Is Important.....	15	<input type="checkbox"/> Create a System for Handling Your Money.....	88
<input type="checkbox"/> Moving Past the Paperwork.....	15	<input type="checkbox"/> Introduce Your Children to Personal Finance.....	90
<input type="checkbox"/> Common Mistakes to Avoid.....	15	<input type="checkbox"/> Let's Review the Essential Principles.....	92
<input type="checkbox"/> A Preview of What You Will Be Doing.....	16	CHAPTER 4: Make the Most of Your Employment Benefits.....	93
<input type="checkbox"/> Start Your Things to Do List.....	17	<input type="checkbox"/> Maximizing What Your Employer Offers.....	93
<input type="checkbox"/> Gather Primary Documents.....	18	<input type="checkbox"/> Common Mistakes to Avoid.....	95
<input type="checkbox"/> Set Up Your Personal Filing System.....	20	<input type="checkbox"/> A Preview of What You Will Be Doing.....	95
<input type="checkbox"/> Protect Your Personal Identity.....	23	<input type="checkbox"/> Summarize Your Employment Benefits.....	94
<input type="checkbox"/> Organize Your Personal & Family Data.....	24	<input type="checkbox"/> Tax Treatment of Benefits.....	98
<input type="checkbox"/> Outline Your Family Tree.....	26	<input type="checkbox"/> Let's Review the Essential Principles.....	98
<input type="checkbox"/> Building & Tracking Your Social Capital.....	27	Part I Getting Organized Overview.....	99
<input type="checkbox"/> Select Your Financial Service Providers.....	27	Part II — Financial Planning - The Essential Principles.....	101
<input type="checkbox"/> Obtain Your Credit Report & Score.....	30	<input type="checkbox"/> The Whole Picture.....	103
<input type="checkbox"/> Let's Review the Essential Principles.....	32	<input type="checkbox"/> Why Develop a Financial Plan?.....	104
CHAPTER 2: Know Where You Stand.....	33	<input type="checkbox"/> Why Do People Avoid Financial, Estate & Gift Planning?.....	105
<input type="checkbox"/> The Journey Begins Where You Are.....	34	<input type="checkbox"/> Procrastination.....	105
<input type="checkbox"/> Common Mistakes to Avoid.....	34	<input type="checkbox"/> Understand the <i>financial</i> PARTNER Planning System.....	106
<input type="checkbox"/> A Preview of What You Will Be Doing.....	34		



CHAPTER 5: Goal Setting	109	CHAPTER 9: Tax Planning	149
□ Let Yourself Be Guided by Goals	109	□ Reduce Your Taxes	149
□ Common Mistakes to Avoid	110	□ Common Mistakes to Avoid in Tax Planning	150
□ A Preview of What You Will Be Doing	110	□ A Preview of What You Will Be Doing	150
□ Define What Really Matters	110	□ Going Through the Six-Steps	151
□ It's Your Dream	112	□ Lower Income Taxes	153
□ Let's Review the Essential Principles	112	□ Tax Planner	154
CHAPTER 6: Financial Independence/Retirement Planning	113	□ Let's Review the Essential Principles	157
□ Approach Your FIR	113	CHAPTER 10: Insurance / Risk Mgt Planning	159
□ Common Mistakes to Avoid in Retirement Planning	114	□ Review Your Insurance Policies	159
□ A Preview of What You Will Be Doing	114	□ Common Mistakes to Avoid in Insurance / Risk Mgt. Planning	160
□ Going Through the Six-Steps	117	□ A Preview of What You Will Be Doing	160
□ Financial Independence/Retirement Savings Projections	120	□ Two Kinds of Insurance	160
□ Let's Review the Essential Principles	124	□ Going Through the Six-Steps	163
CHAPTER 7: Major Expenditure Planning	125	□ Insurance Policies Summary	164
□ Plan Ahead for Your Major Expenditures	125	□ Life Insurance, Disability & Long-Term Care Needs	166
□ Common Mistakes to Avoid with Major Expenditures	126	□ Let's Review the Essential Principles	170
□ A Preview of What You Will Be Doing	126	CHAPTER 11: Estate & Gift Planning	171
□ Major Expenditure Prioritizer	127	□ Address Your Estate & Gift Plan	171
□ Going Through the Six-Steps	128	□ Common Mistakes to Avoid in Estate & Gift Planning	172
□ Let's Review the Essential Principles	129	□ A Preview of What You Will Be Doing	172
CHAPTER 8: Investment Planning	131	□ Learning the Basics—An Estate & Gift Planning Overview	173
□ Begin Your Investment Planning Now	131	□ Going Through the Six-Steps	178
□ Common Mistakes to Avoid in Investment Planning	132	□ Estate & Gift Plan Goals & Documents Outline	180
□ A Preview of What You Will Be Doing	132	□ Estate & Gift Planning Location Sheet	183
□ Understanding Investing	133	□ Let's Review the Essential Principles	184
□ Assessing Your Risk Tolerance	137	Part II Overview & Summary	185
□ Asset Allocation	140	Celebrate Your Accomplishments	193
□ What Investments Are Best for You?	144	Glossary	G 1
□ Going Through the Six-Steps	145	International Appendix	G 17
□ Investment Policy Statement & Plan	146	Donor Contribution Form	G 23
□ Let's Review the Essential Principles	148		



Should you have any questions or require any additional information, or just want to discuss your situation please contact us.

Stay safe and healthy – there's lots of work to do and fun to be had!!!

Wishing you all the very best,

Valentino

Valentino Sabuco, Executive Director
v.sabuco@TheFinancialAwarenessFoundation.org

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

