



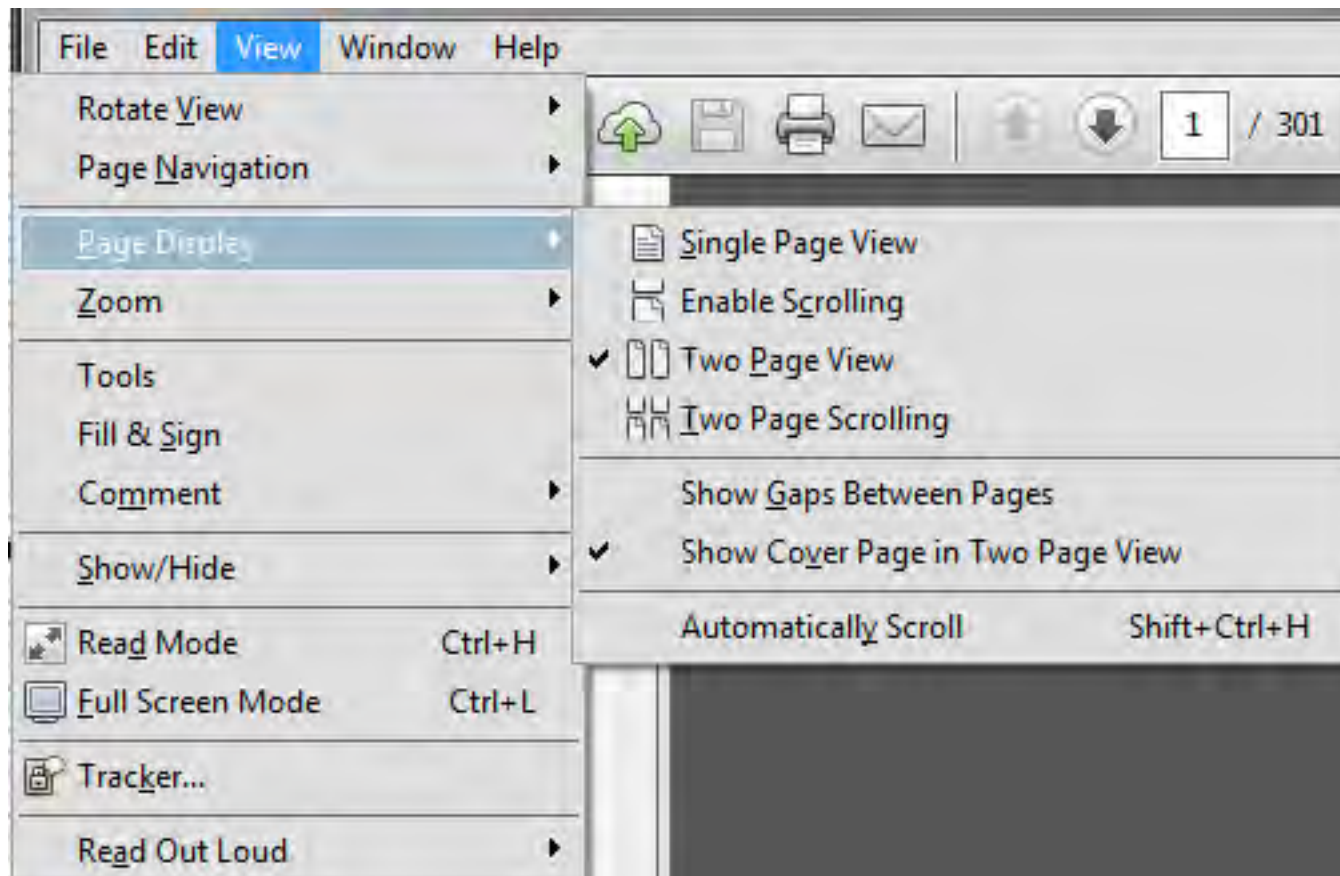
Improving Financial Awareness & Financial Literacy Movement™ Program Overview / Planner



The following is best viewed
in your PDF browser using the ‘Two Page View’
that shows the Cover Page in the ‘Two Page View’

If you are familiar with this setting it can be found while you're in your PDF viewer program with this file loaded then

1. Click on the ‘View’ tab
2. Click on ‘Two Page View’
3. Click on ‘Show Cover Page in Two Page View’



Welcome to Improving Financial Awareness & Financial Literacy Movement Program Overview / Planner

Contents

Program Overview / Planner.....	2
About The Financial Awareness Foundation	3
The Master Plan and How Everyone Benefits	5
How Everyone Benefits.....	8
Fun Ways to Participate in The Improving Financial Awareness & Financial Literacy Movement & Campaigns	9
Calendar-Planner	12
Notes & Ideas	16
We Welcome Your Assistance and Support.....	18
Research Footnotes & Links for Financial Awareness & Financial Literacy.....	19
Donor Contribution Form	23



Improving Financial Awareness & Financial Literacy Movement Program Overview / Planner

As a community leader you can play a **VERY IMPORTANT** and strategic role in improving financial awareness and financial literacy, while creating goodwill and new revenues opportunities for you and many nonprofits. This can be done by actively supporting and participating within the semiannual financial awareness movement built around the strategic venues of National Financial Literacy Month (April) and National Estate Planning Awareness Month / Week (3rd week in October).

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 not having up-to-date estate and financial 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 government.

We Have A Serious Problem that Requires Immediate Attention

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 a current estate plan 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. Estate planning is not just for the wealthy and elderly; it's important for everyone.
- Too many young people and their families are burdened with excessive education and other forms of debt.
- 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.



Managing personal finances today is more complicated and more important than ever. We're living longer, but saving proportionately less. Scores of us feel less secure in our jobs and homes than we did in the past.

Most people are not taught the essential principle to smart personal financial management at home or in school, thus they don't have the proper tools to address every day financial 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.

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 financial decisions.

To learn more about this epidemic review our white paper ***We Have a Lack of Financial Awareness & Financial Illiteracy Epidemic that Requires Immediate Attention***

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinIlliteracyEpidemic.pdf>

There is a real solution to this lack of financial awareness and financial illiteracy epidemic and it revolves around educating the general public, financial service and nonprofit professionals and their organizations to the essentials principles to smart personal financial management and motivating them to take appropriate actions to get and keep their financial, estate, and gift plans in order.

We can use your assistance.

We realize that you may not be a financial service or nonprofit professional, but as a concerned individual / organization you can encourage your associates, employees, clients, donors and prospects to think about their personal financial and estate planning to improve for their future. A thoughtful and engaged individual is one who has planned financially and understands where he or she is and is going financially, and what they can do today and in their future. Encouraging and teaching financial literacy and the key essential principles to smart financial management are critical to the future economic health of the country, nonprofits, and the general public. People need to be empowered to communicate and work more effectively with their financial advisors and to make better informed and productive everyday money decisions.

About The Financial Awareness Foundation

The Financial Awareness Foundation is a 501(c)(3) nonprofit organization; our mission is to significantly help solve a major social problem dealing with the lack of financial awareness and financial literacy.

The Foundation serves as a nonpolitical "financial awareness advocate" for the general public, the financial service and nonprofit professionals, their associations and companies, educational institutions, employers, and municipalities.

We believe that teaching financial awareness, financial literacy and the essential principles to smart personal financial management are very important as this gives people the tools of empowerment to:

- Make better informed and productive everyday money decisions
- Save time and money with their financial advisors and service providers
- Have the best opportunities to reach and maintain their personal / family financial dreams
- Enjoy a financially secure debt free future
- Advance their legacy.



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, and employers to actively focus their vast community resources into **The Improving Financial Awareness & Financial Literacy Movement & Campaigns** - a growing concentrated personal finance content media blitz campaign every six months through the strategic campaign venues of
 - **National Estate Planning Awareness 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, enter, scroll down to **Downloads** and click on **About National Estate Planning Awareness Week**.
<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>
 - **National 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. The full text of the proclamation can be found if you click onto or cut and paste the following URL into your web browser, enter, scroll down to **Downloads** and click on **About National Financial Literacy Month**.
<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>
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.

We are hard at work to become the 'foundation of choice' for improving financial awareness and financial literacy.

You are not required to financially support The Financial Awareness Foundation in any way or have to pay a marketing or membership fee or make a contribution in order to participate in these important improving financial awareness movement or programs. But as a 501(c)(3) nonprofit your support and contributions are always welcomed and very much appreciated.

To learn more about The Financial Awareness Foundation, the Improving Financial Awareness Movement, Campaigns, & Programs

Visit our website at <http://www.TheFinancialAwarenessFoundation.org>

Becoming a TFAF-Ambassador-Volunteer-Overview

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>

Here are links to our latest **Improving Financial Awareness & Literacy Movement Report & Magazine™** that shows how our colleagues across the country are participating.

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

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



The Master Plan and How Everyone Benefits

There is a real solution to this lack of financial awareness and financial literacy epidemic that revolves around better educating the general public, financial service and nonprofit professionals to the essential principles to smart personal financial management while motivating them to take appropriate actions. 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. **We can use your assistance.**

You can play an integral role in joining with your colleagues from the financial service, nonprofit, and academic communities, employers, government agencies, and the news media in supporting and actively participating in building semiannual financial awareness programs to touch the vast majority of the general public. This can be accomplished with the subtle **concentrated personal finance content media blitz** around the strategic campaign venues of:

- National Financial Literacy Month (NFLM - April)
- National Estate Planning Awareness Month / Week (NEPAW - 3rd Week in 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 campaign venues, with educational and motivating reminders to get and keep your financial, estate, and gift plans in order.

The objective is to encourage you and other financial / nonprofit / education professionals and their organizations, employers, municipalities, and the news media to actively participate in this movement to alert, educate, motivate, and assist everyone to cost effectively establish and keep their estate and financial plans and gifting plans current. 120 million America's-half the adults; rich to poor - don't have plans, that's a lot of quality business for the financial service and nonprofit professionals!

Please join us and other financial service and nonprofit organizations and professional associations such as: the American Institute of Certified Public Accountants, the Society of Attorney-Certified Public Accountants, the American Bar Association, the Association of Fundraising Professionals, 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[®], and The International Association of Advisors in Philanthropy that have supported National Financial Literacy Month and National Estate Planning Awareness Month/Week.

We understand that this is a massive undertaking. As we move into the **Awareness & Financial Literacy Movement** it's being accomplished their associates 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



9th year of the **Improving Financial** through leading organizations and



- News media

Together these organizations represent nearly 1,000,000 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 organizations are helping to mobilize the financial and estate planning and nonprofit communities by providing support, tools, and education for their professionals and the general public they serve.

Below is a link to the most recent **Improving Financial Awareness & Financial Literacy Movement Report & Magazine™**. This 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 what you colleagues are doing

- Supporting Presidential and 23 Governor's Proclamations (starting on page 38),
- Evaluation Services fall campaign launching webinar (page 75),
- AFP's (Association of Fund Raising Professionals) said to its 35,000 members (page 77),
- Purposeful Planning Institute - said to their community (page 80),
- Trust & Estates - (page 82),
- Planned Giving Design Center - (page 85),
- American Academy of Attorney-CPA's (page 92),
- HeirSearch.com estate planning video (page 97),
- The American College (page 168),
- PBS "Are Your Ducks In A Row? Award winning campaign (page 175-180),
- Expanded Educational Initiatives (page 215),
- International Section (page 227), and so much more.

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



Please join the **2017 Distinguished Co-Honorary Chairs for the Improving Financial Awareness & Financial Awareness Movement**



Representing Academia Thought Leadership

Patricia D. White, JD, Dean of the University of Miami School of Law. Her legal career spans four decades as an attorney and an educator. Dean White is transformative and a visionary; and the National Jurist Magazine named her as one of the most influential people in legal education in 2015, 2014, and in 2013.



Representing Financial and Legal Services Thought Leadership

John A. Warnick, JD, CEO & Founder of the Purposeful Planning Institute. Along with his duties as the CEO of PPI, John A. is a practicing estate planning attorney who balances his enthusiasm for tax savings with in-depth discovery and purposeful questions to ensure the planning is congruent with his client's core values. John A. delivers workshops across the country for estate planning attorneys and financial planners sharing the six paradigms of Purposeful Planning and the Seven Keys of the Purposeful Trust. Received his BA magna cum laude from Brigham Young University and his JD from George Washington University with honors, and has authored two BNA (Bureau of National Affairs) Tax Management portfolios and many other professional articles.



Representing News Media Thought Leadership

Randy A. Fox, Editor in Chief of Planned Giving Design Center a national website and newsletter for philanthropic advisors. Randy's exceptional ability to make the most complex and technical materials clear and relevant has given him the opportunity to have been a regular contributor to numerous publications. Randy also co-founded and is an active principle of Life Legacy Case Design, a back office for professional advisors engaged with high net worth families, and EzCharitable, an online philanthropic giving training resource for professionals. He's past president Board of the International Association of Advisors in Philanthropy and recipient 2015 Fithian Leadership Award.



Representing Nonprofit / Charitable Gift Planning Community Thought Leadership

Michael Kenyon, President and CEO of the National Association of Charitable Gift Planners the leading organization setting standards, providing education, resources and advocacy for charitable gift planners. He oversees the CGP Indianapolis based staff and a national network of over 100 councils and 8,000 CGP members promoting the value of charitable gift planning to legislators in D.C. and nationally speaks on the role of advocacy in the nonprofit sector.

and leading financial service and nonprofit associations and their members, professionals, financial service companies and nonprofits, small and large employers, technology companies, municipalities, and the news media in supporting and participating in the strategic venues.



How Everyone Benefits

What a great opportunity for you to create goodwill and new revenue opportunities while performing a very important and values community service.

- You benefit 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, prospects, and associates benefit by receiving personal financial and estate planning materials to improve their personal financial position and you receive a powerful campaign and program to use within your organization to generate new sources of revenues.
- Families benefit by learning the essential principles to smart financial management; it empowers them to make better informed productive everyday financial decisions, save time and money with their financial advisors and service providers, and have the best possibilities to reach and maintain their personal and family financial dreams, to enjoy a financial secure debt free future, while they advance their legacy.
- Financial service professionals and their organizations benefit by acquiring new business from more informed and motivated clients.
- Employers benefit from having employees who are less stressed, happier and more productive.
- Nonprofits and fundraisers benefit with increased donations, planned gifts, alternate beneficiary selections and bequests.
- Universities benefit by having alumni, faculty and staff who are less stressed, happier and more productive and more philanthropic.
- Philanthropists benefit by helping to solve a major social problem that leads to a better world.
- The news media benefits by providing its audience with timely valuable information.
- Municipalities benefit by having happier and financially successful constituents, and a reduced strain on social welfare services.
- Everyone actually benefits with a stronger and financially sound economy.

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



Fun Ways to Participate in The Improving Financial Awareness & Financial Literacy Movement & Campaigns

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 Awareness Movement & Campaign and programs.

1. Place financial and estate planning editorial content within your websites, newsletters, social media groups, local newspapers, and radio/television/web-based shows, in support of **National Financial Literacy Month** and **National Estate Planning Awareness Week**; and **encourage your readers to get and keep their financial, estate and gift plans up to date**. If you need content please contact us or see the sample articles Press & Industry Media Kits and Guides found under the Campaign tab at www.TheFinancialAwarenessFoundation.org

2. **Add this icon to your website** with a link to

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



Co-Brand by placing your logo here

Here's a link to download the Foundation graphic

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-master-IFAFI-Blue.jpg>

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

<http://www.thefinancialawarenessfoundation.org/pdf/Co-brand-IFAFI-BI-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. You can preview a version of the "**Basic Building Blocks to Successful Estate Planning**" we did with the American Endowment Foundation at <https://www.youtube.com/watch?v=LFUi77VUtEs&feature=youtu.be>

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 Planning"

Encourage your company and associates to host or take part in a 'general public' or a 'professional' webinar or community-wide workshop built around financial and estate planning during the months of April and October in support of improving financial awareness and financial literacy. 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 service and nonprofit professionals to join in with these programs or do their own versions.

5. **Invite one of our speaker bureau members to address your conference, event, and meetings** on the Importance of Improving Financial Awareness & Financial Literacy for your organization. Or become a speaker bureau member to address conferences, events, and meetings on the Importance of Improving Financial Awareness & Financial Literacy.
6. **Ask your State Governor and other political contacts to provide supporting proclamations** for Financial Literacy Month April and for Estate Planning Awareness Month in October. Semi-annually contact your state governor and request a supporting proclamation for
 - **National Financial Literacy Month (April) & Estate Planning Awareness Month (October)**

This is usually an online form that's easy to complete. Here's a link to a sample proclamation

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

Do the same with your Congressmen and Congresswomen, and with local Mayors & City Council Members

7. **Build and schedule your organization's annual marketing, branding, advertising, and social networks programs** around these amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your clients, members, and prospects.
8. **Contact us if you can volunteer some staff or executive time** to help on national and international efforts.



9. **Become an Ambassador / Volunteer / Strategic Partner with The Financial Awareness Foundation**

Organizations are not required to financially support The Financial Awareness Foundation in any way or 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. But as a 501(c)(3) nonprofit financial support and contributions are always welcomed and very much appreciated. Here's a link that introduces this further and you can share with your employees and associates.

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>

10. **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 here 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>

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.



April 2017 is the
**13th Anniversary of
National Financial Literacy Month**

Join the leading financial service and nonprofit associations and nearly 1,000,000 financial service and nonprofit professionals by supporting and participating in the **Improving Financial Awareness & Financial Literacy Movement**

See What Your Colleagues Are Doing
www.TheFinancialAwarenessFoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf

The Financial Awareness Foundation
Improving financial awareness & financial literacy™



Calendar-Planner

The following is a scheduling tool designed to assist with the planning of your annual involvements with the improving financial awareness & financial literacy movement, campaigns, programs, & activities. Please feel free to edit it and adjust for your unique situation.

Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
1. Placement of Financial & Estate Planning Editorial Content in Support of NFLM & NEPAW													
Public Financial Planning & Estate Planning Content													
1.	Appoint responsible person to manage the program		Xxxxxx	xxxxxx					xxxxxx	xxxxxx			
2.	Develop content for the public or contact us for materials		Xxxxxx	xxxxxx					xxxxxx	xxxxxx			
3.	Website												
4.	Newsletters												
5.	Social Media												
6.	News Media												
7.	Develop Annual Flyer												
8.	Developer Semiannual mailer												
9.													
10.													
11.	Present Content				Present Content						Present Content		
12.													
Campaign Communications													
1.	Appoint responsible person to manage the program		xxxxxx	xxxxxx					xxxxxx	xxxxxx			
2.	Develop content for the members & associates or contact us for materials		Xxxxxx	xxxxxx					Xxxxxx	xxxxxx			
3.	Members												
4.	Members & Associates												
5.	Develop Annual Flyer												
6.	Developer Semiannual mailer												
7.													
8.	Present Content				Present Content						Present Content		
9.													
2. Add a Improving Financial Awareness & Financial Literacy Page to your Website													
1.	Add a Improving Financial Awareness & Financial Literacy Page to your website												
2.	Populate it with articles and links on												
3.	Financial Planning												
4.	Estate Planning												
5.	Gift planning												
6.	Life Planning												
7.	Legacy Planning												
8.													
9.	Add a blog												
10.													
11.	Contact for content and ideas												



Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
12.													
13.	Establish and update refresh schedule												
14.													
15.													
3. Webinars & Seminars													
Public Presentation													
1.	Appoint responsible person to manage the program	Xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
2.	Develop presentation materials or contact us for materials	Xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Select Speakers		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
4.	Develop marketing materials		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
5.	Add to calendar		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
6.	Distribute marketing materials			Xxxxxx	xxxxxxxx					Xxxxxx	Xxxxxx		
7.													
8.	Presentation				Present Content						Present Content		
9.	Follow-up Survey				Xxxxxxxx						Xxxxxxxx		
10.													
11.													
12.													
13.													
14.													
15.													
Professional Presentation													
1.	Appoint responsible person to manage the program	Xxxxxx	xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
2.	Develop presentation materials or contact us for materials	Xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Select Speakers		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
4.	Decide if you are offering CE credits, if so get appropriate certifications or program approvals		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
5.	Develop marketing materials		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
6.	Distribute marketing materials			Xxxxxx	xxxxxxxx					Xxxxxx	Xxxxxx		
7.													
8.	Presentation				Present Content						Present Content		
9.	Follow-up Survey				xxxxxxx						Xxxxxxxx		
10.													
11.													
12.													
4. Local Seminars & Workshops													
1.	Appoint responsible person to manage the program	Xxxxxx	xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
2.	Develop presentation materials or contact us for materials	xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Select Speakers		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
4.	Decide if you are offering CE credits, if so get appropriate certifications or program approvals		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
5.	Develop marketing materials		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
6.	Distribute marketing materials			Xxxxxx	Xxxxxxxx					Xxxxxx	Xxxxxxxx		
7.													



Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
8.	Presentation				Present Content						Present Content		
9.	Follow-up Survey				Xxxxxxx						xxxxxxx		
5. Circulate Press & Industry Media Kits to Members													
1.	Appoint responsible person to manage the task	Xxxxxx	Xxxxxx	xxxxxx				Xxxxxx	Xxxxx	Xxxxxx			
2.	Customize and edit Kit	Xxxxxx	Xxxxxx	xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Develop communication	xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
4.	Send out and post communication		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
5.													
6.													
7.													
8.													
9.													
6. Ask Your State Governor and other Political Contacts for a Supporting Proclamation													
1.	Semi-annually contact your state governor and request a supporting proclamation for												
	National Financial Literacy Month (April)		XXXXX	Xxxxxx	Xxxxxxxx								
	Estate Planning Awareness Month (October)								Xxxxx	xxxxxx	xxxxxxx		
	This is usually an online form that's easy to complete. Here's a link to a sample proclamation http://home.thefinancialawarenessfoundation.org/pdf/DraftImprovingFinancialAwareness-NFLM-NEPAW-Proclamation.pdf												
2.	Do the same with your Congressmen & women		Xxxxxx	Xxxxxx	Xxxxxxxx				Xxxxxx	xxxxxx	Xxxxxxx		
3.	Do the same with local Mayors & City Council Members		Xxxxxx	Xxxxxx	Xxxxxxxx				Xxxxxx	Xxxxxx	xxxxxxx		
4.													
5.													
7. Current Program Integration													
1.	Annual Conference												
2.													
3.	Education Development												
4.													
5.	Publishing												
6.													
7.	Videos												
8.													
9.	Leave a Legacy®												



Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
8. Other Programs & Activities													
Financially Green Organization Certification Programs™													
1.	For Staff												
2.	For Members												
3.	For Other Organizations												
4.													
5.													
6.													
Other Thoughts													
1.	National Philanthropy Day												
2.	Videos												
3.	Publishing												
4.	Assist with a campaign to get all state governors to sign supporting proclamations for National Financial Literacy Month & National Estate Planning Awareness Week												
5.	Contest for the best Financial Awareness 1. Community Activity 2. Checklist 3. Article 4. Campaign Slogan 5. Campaign Flyer 6. Website 7. Other possibilities?												
6.	Challenge who has the most financially literate 1. Chapter / Council 2. Employees 3. Members 4. City 5. State 6. University												
7.	Joint Research Projects & White Papers												
8.	Joint Fundraising Campaigns												
9.													
10.													
11.													
12.													
13.													
14.													
15.													
16.													
17.													
18.													
19.													
20.													
21.													







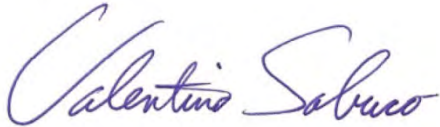
We Welcome Your Assistance and Support

To learn more about us and the improving financial awareness & financial literacy movement, campaigns, programs and efforts, and **'how you can make a meaningful difference'** visit us at www.TheFinancialAwarenessFoundation.org and join our new discussion group on [LinkedIn](#).

If you have further ideas or require additional information about us and the financial awareness movement, campaigns, programs and activities, or to discuss volunteer activities, sponsorships, planned gifts, and contributions and grants to The Financial Awareness Foundation, please contact me directly.

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

Respectfully submitted,



Valentino Sabuco, CFP[®], AEP[®]

Executive Director & Publisher

The Financial Awareness Foundation

A 501(c)(3) Nonprofit Dedicated to Significantly

"Improving financial awareness & financial literacy..."SM

Direct: 707.322.1597

E-mail: v.sabuco@TheFinancialAwarenessFoundation.org

Website: www.TheFinancialAwarenessFoundation.org

959 Golf Course Drive #273

Rohnert Park, Sonoma County, CA 94928

Office: 707.586.8620

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



Research Footnotes & Links for Financial Awareness & Financial Literacy

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 Thank you.

- **Press & Industry Media Kit** - For additional information about the financial awareness campaigns, download the full media kit, and see the latest Improving Financial Awareness & Financial Literacy Movement Report & Scrapbook please visit the Campaign tab at www.TheFinancialAwarenessFoundation.org/
- **National Estate 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, enter, scroll down to **Downloads** and click on **About National Estate Planning Awareness Week**
<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>
- **National 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>
- **Local and National Professional Contacts** - To contact financial and estate planning professionals and nonprofit professionals in your community, visit
 - **AICPA** – Find a CPA –
 - www.aicpa.org/FORT_HEPUBLIC/FINDACPA/Pages/FindACPA.aspx
 - **American Association of Attorney-CPA’s** – Find an Attorney – CPA
 - www.attorney-cpa.com/eweb/DynamicPage.aspx?Site=AAA-CPA&WebCode=IndSearch
 - **Association of Fundraising Professionals** –
 - Leadership - www.afpnet.org/
 - Find a local chapter - www.afpnet.org/audiences/chapters.cfm?navItemNumber=525
 - **CFP Board** – Find a CFP Professional –
 - www.cfp.net/
 - **Martindale** – Find a Lawyer or Law Firm –
 - www.martindale.com/
 - **NAEPC** – Find an AEP or Estate Planner –
 - 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>

Visit us at www.TheFinancialAwarenessFoundation.org and click on the Campaign tab to download the complete Press & Industry Media Kit, the Councils / Chapters / Branch Office Guide & Information Kit, and join our mailing list.



Research footnotes & links for improving financial awareness & financial literacy

1. The Financial Awareness Foundation
 - a. Spring Improving Financial Awareness & Financial Literacy Report & Magazine™
 - i. <http://www.thefinancialawarenessfoundation.org/pdf/SpringCampaignReport&Magazine.pdf>
 - b. Fall Improving Financial Awareness & Financial Literacy Report & Magazine™
 - i. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
 - c. About National Financial Literacy Month
 - i. <http://home.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>
 - d. About National Estate Planning Awareness Week
 - i. <http://home.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>
 - e. **The Improving Financial Awareness & Financial Literacy Movement Program Planner / Overview**
 - i. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>
 - f. For the financial service and nonprofit professionals - **How Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line**
 - i. http://www.thefinancialawarenessfoundation.org/pdf/TFAF-AdvisorsSupport-Improving_Financial_Awareness-can_increase_your_bottom_line.pdf
 - g. For the general public - **Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All**
 - i. http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Public_Support_for_the_Improving_Financial_Awareness.pdf
2. AICPA – 360 degrees of Financial Literacy
 - a. <http://www.360financialliteracy.org/Topics/Retirement-Planning/Social-Security/Sources-of-retirement-income-filling-the-Social-Security-gap>
3. Aegon Retirement Readiness Survey - 2015
 - a. <http://www.aegon.com/Documents/aegon-com/Research/2015-Retirement-Survey/Aegon-Retirement-Readiness-Survey-2015-Global-Report.pdf>
4. AARP
 - a. http://www.aarp.org/content/dam/aarp/research/public_policy_institute/econ_sec/2012/Social-Security-Whos-Counting-on-It-fs-252-AARP-ppi-econ-sec.pdf
5. CFP Board
 - a. <http://www.cfp.net/Media/release.asp?id=227>
6. Center on Budget and Policy Priorities
 - a. <http://www.cbpp.org/cms/index.cfm?fa=view&id=3260>
7. Center for Retirement Research at Boston College
 - a. How Does Aging Affect Financial Decision Making?
 - i. <http://crr.bc.edu/briefs/how-does-aging-affect-financial-decision-making/>
 - b. A Golden Age of Philanthropy Stills Beckons: National Wealth Transfer and Potential for Philanthropy
 - i. <http://campaign.r20.constantcontact.com/render?ca=2ca82112-5604-40b4-8952-c8eb1fba4295&c=286fbc80-40b0-11e3-ac06-d4ae52843dc7&ch=2875fe10-40b0-11e3-ac06-d4ae52843dc7>
 - c. Are Americans of All Ages and Income Levels Shortsighted About Their Finances?
 - i. <http://crr.bc.edu/briefs/are-americans-of-all-ages-and-income-levels-shortsighted-about-their-finances/>
8. Council for Economic Education
 - a. <http://councilforeconed.org/>
 - b. <http://www.surveyofthestates.com/>
 - c. <http://www.surveyofthestates.com/#2016>
9. Consumer Financial Protection Bureau
 - a. Financial well-being: The goal of financial education
 - i. http://files.consumerfinance.gov/f/201501_cfpb_report_financial-well-being.pdf
10. Demographics of the United States
 - a. http://en.wikipedia.org/wiki/Demographics_of_the_United_States



11. Employee Benefit Research Institute Retirement Confidence Survey
 - a. <http://www.ebri.org/surveys/rcs/>
 - b. www.ebri.org/pdf/FFE125.4June09.Final.pdf
 - c. www.ebri.org/pdf/publications/books/.../DB.Chapter%2006.pdf
12. Federal Reserve Board
 - a. <http://www.federalreserve.gov/2015-report-economic-well-being-us-households-201605.pdf>
 - b. http://www.minneapolisfed.org/publications_papers/pub_display.cfm?id=4230
 - c. <http://www.federalreserve.gov/pubs/bulletin/2014/pdf/scf14.pdf>
 - d. http://www.strongfinancialfuture.org/wp-content/uploads/2015/12/What-its-Worth_Full.pdf
13. Financialcorps
 - a. http://financialcorps.com/bill-melinda-gates-foundation-seeks-mobile-money-and-financial-education-solutions/?utm_source=12.2.2014+Newsletter&utm_campaign=FC_Newsire_12.2.2014&utm_medium=email
14. JPMorgan Asset Management
 - a. The Millennials
 - i. https://www.jpmorganfunds.com/blobcontent/690/439/1323431015884_RI-WPMILLENNIALS.pdf
15. Jumpstart - 2015-National Standards in K-12 Personal Finance
 - a. http://www.jumpstart.org/assets/files/2015_NationalStandardsBook.pdf
16. Kaiser Family Foundation
 - a. <http://facts.kff.org/chart.aspx?cb=58&sctn=162&ch=1725>
17. Knowledge @ Wharton
 - a. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2642>
18. MasterCard Financial Literacy Index Report (2014H1)
 - a. <http://www1.mastercard.com/content/intelligence/en/research/reports/2015/mastercard-financial-literacy-index-report-2014h1.html>
19. MetLife Demographic Profiles
 - a. www.metlife.com/searchresults?query=demographic+profile&and_on=Y&sel_path=metlife%2Fmmi%2Fresearch%2Findex.html&remoteUser=71.198.244.63-3947949424.30201431
 - b. MetLife Study of Employee Benefit Trends
 - i. <http://www.metlife.com/business/insights-and-tools/industry-knowledge/employee-benefits-trends-study/index.html#highlights>
20. NAEPC - HIGH-PERFORMANCE TEAMING & PROFESSIONAL COLLABORATION
 - a. http://www.naepc.org/assets/national/files/High%20Performance%20Teaming%20White%20Paper%202002_25_16.pdf
21. National Association of State Treasurers
 - a. <http://nast.org/financial-literacy/>
22. Neighbor Works America
 - a. Survey – 1/3 of US Adults have no emergency savings
 - b. <http://www.neighborworks.org/Media-Center/Press-Releases/2015-Archive/March/One-in-three-U-S-adults-has-no-emergency-savings>
23. PWC - Bridging the Financial Literacy Gap: Empowering teachers to support the next generation
 - a. <http://www.pwc.com/us/en/about-us/corporate-responsibility/assets/pwc-financial-education-report.pdf>
24. S&P Ratings Services Global Financial Literacy Survey
 - a. <https://www.mhfi.com/corporate-responsibility/global-financial-literacy-survey>
25. SEC
 - a. www.sec.gov/pdf/report99.pdf
26. SHRM Research Articles
 - a. <http://www.shrm.org/Research/Articles/Pages/default.aspx>
27. Social Security
 - a. Social Security 2016 Changes
 - i. <http://www.ssa.gov/news/press/factsheets/colafacts2016.html>
 - b. Social Security – A Profile of Older Americans 2011



- i. http://www.aoa.gov/aoaroot/aging_statistics/Profile/2011/docs/2011profile.pdf
- 28. UBS and PwC
 - a. Billionaires: Master architects of great wealth and lasting legacies
 - i. <http://www.pwc.com/gx/en/financial-services/publications/assets/pwc-ubs-billionaire-report.pdf>
- 29. US Census Information
 - a. www.census.gov/
 - b. www.census.gov/compendia/statab/2011/tables/11s0540.xls - 2010-12-07
 - c. www.census.gov/sipp/workpaper/wp110_9005.pdf - 2009-09-08
 - d. <http://www.census.gov/programs-surveys/acs/data.html/>
 - e. The 2012 Statistical Abstract
 - i. www.census.gov/compendia/statab/cats/income_expenditures_poverty_wealth.html
 - f. Quick Facts
 - i. <http://quickfacts.census.gov/qfd/states/00000.html>
 - ii. <http://www.census.gov/quickfacts/table/PST045214/00>
 - g. The American Community Survey (ACS)
 - i. <http://www.census.gov/acs/www/data/data-tables-and-tools/>
- 30. US Dept of Health & Human Services
 - a. Health, United States, 2010
 - b. <http://www.cdc.gov/nchs/fastats/lifexpec.htm>
- 31. US News
 - a. http://finance.yahoo.com/news/pf_article_109508.html
 - b. <http://money.usnews.com/money/blogs/planning-to-retire/2010/01/12/the-4-biggest-sources-of-retirement-income>
- 32. The Institute for College Access & Success - Student Deb and the Class of 2014
 - a. http://ticas.org/sites/default/files/pub_files/classof2014.pdf
- 33. WalletHub.
 - a. 2015's The Most & Least Financially Literate States in America.
 - i. <http://wallethub.com/edu/most-and-least-financially-literate-states/3337/>
- 34. Wells Fargo
 - a. https://www.wellsfargo.com/press/2011/20111116_80IsTheNew65



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 **National Financial Literacy Month & National Estate Planning Awareness Week** and or to receive complimentary estate and financial planning content and a link for your website, contact Valentino Sabuco, CFP[®], AEP[®], The Financial Awareness Foundation's Executive Director & Publisher at 707.586.8620, or v.sabuco@TheFinancialAwarenessFoundation.org.





The **FINANCIAL AWARENESS** Foundation “Your Financial Partner”

Improving Financial Awareness & Financial Literacy™

Donor Contribution Form

Have You Ever Heard Someone Say...

“Doesn't the government provide for that?” *“Estate and financial planning is too complicated and expensive.”*

“All my property is titled in joint tenancy with my spouse so I don't need a will.”

“Estate and financial planning is only for the rich.”

“I'm too young to do estate or financial planning.”

The Financial Awareness Foundation is a 501(c)(3) nonprofit organization. We serve as a nonpolitical “financial awareness advocate” for the general public, the financial service, nonprofit, and educational professionals and their organizations, municipalities, and employers.

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 awareness, financial literacy and the essential principles to smart personal financial management are very important as this gives people the tools of empowerment to:

- Make better informed and productive everyday money decisions
- Save time and money with their financial advisors and service providers
- Have the best opportunities to reach and maintain their personal / family financial dreams
- Enjoy a financially secure debt free future
- Advance their philanthropy and legacy plans.

WE CAN'T DO THIS ALONE – WE NEED YOUR HELP!

Please consider making a ‘Tax-deductible Contribution’ to The Financial Awareness Foundation by completing and returning this page. Thank you for your consideration.

To learn more about us, link to www.TheFinancialAwarenessFoundation.org

Click here **DONATE TODAY!** or go to <http://home.thefinancialawarenessfoundation.org/donationgateway.html> to make your tax deductible online contribution or enclosed a check payable to “The Financial Awareness Foundation” or complete the following credit card form.

Please accept my contribution of \$ _____

Charge My VISA/MC/AMEX # _____ Exp. Date _____

Name of Cardholder _____ Signature _____

Address _____

Telephone Number _____ Email _____

Call, email, or mail your generous contribution to us at:

The Financial Awareness Foundation

959 Golf Course Drive, #273

Rohnert Park ♦ Sonoma County ♦ CA 94928

707.586.8620 ♦ V.Sabuco@TheFinancialAwarenessFoundation.org

(v-011717)



Blank Page - Inside front cover

The Roadmap to Significantly Improving Financial Awareness & Financial Literacy

Please join in and support and actively participate. 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 campaigns for improving financial awareness and financial literacy.



The FINANCIAL AWARENESS Foundation

“Your financial PARTNER”™

dedicated to significantly

“Improving financial awareness & financial literacy”™

A Financially Green Organization™

www.TheFinancialAwarenessFoundation.org