



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

*Improving Financial Awareness & Financial Literacy™*

**NEWS RELEASE**

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**Alert: The 2017 Improving Financial Awareness & Financial Literacy Movement Spring Campaign begins in April with the 13<sup>th</sup> Anniversary of National Financial Literacy Month**

**2017 campaign slogan – “What’s in your financial and estate plan?”**

April is the 13<sup>th</sup> anniversary of **National Financial Literacy Month** and represents the first strategic campaign venue in the **2017 Improving Financial Awareness & Financial Literacy Movement & Campaign**. This important financial awareness campaign is supported by leading financial service, charitable gift planners, and nonprofit professionals and their organizations who have first-hand experience in dealing with the financial challenges Americans face with regard to financial and estate planning, gift planning, saving, investing, healthcare and planning for their financial futures.

**Join Us in Participating in the Improving Financial Awareness & Financial Literacy Movement and the Concentrated Personal Finance Media Blitz During the Strategic Venue Campaigns of National Financial Literacy Month in April and Six Month Later During National Estate Planning Awareness Month / Week in October** encouraging the general public to get and keep the keep their financial, estate, and gift plans current.

**Here is a great opportunity for you to create goodwill and new revenue opportunities for you and your organization, while performing a very important and valuable community service. And it’s fun and easy to do.**

Please circulate this with your associates and encourage them to participate.

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**We Have A Serious Problem that Requires Immediate Attention**

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 financial and estate plans to protect themselves and their families, we have a serious problem. This lack of financial awareness and financial illiteracy places a **HUGE** growing amount of pressure on families and friends, employers, nonprofits; as well as the ultimate safety net - the state and federal government.

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.

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.

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.

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>

## **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 (NEPAM/W - 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.

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 Seven Keys of Purposeful Trust & Gifts. 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 of the Board of the International Association of Advisors in Philanthropy and recipient of the 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.

We understand that this is a massive undertaking. As we move into the 9<sup>th</sup> year of the **Improving Financial Awareness & Financial Literacy Movement** it's being accomplished through leading organizations and 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
- 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.



To see our progress 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>



## How Everyone Benefits

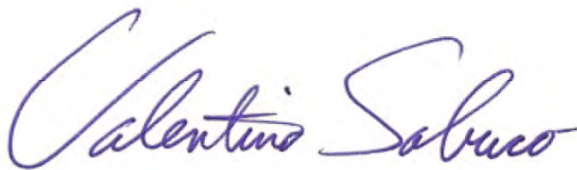
What a great opportunity for you to create goodwill and new revenue opportunities while performing a very important and values community service.

- 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***

On behalf of The Financial Awareness Foundation and the participating associations, organizations, nonprofits, educational institutions, employers, municipalities, financial service and nonprofit professionals and professionals **THANK YOU**. Your efforts in advancing the Improving Financial Awareness & Financial Literacy Movement and helping to make National Financial Literacy Month and National Estate Planning Awareness Week a continuing growing success are having a positive impact on improving financial awareness and financial literacy around the world.

Respectfully submitted,



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Executive Director & Publisher

**The Financial Awareness Foundation**

A 501(c)(3) Nonprofit Dedicated to

*"Improving financial awareness & financial literacy..."<sup>SM</sup>*

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