



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

Improving Financial Awareness & Financial Literacy™

NEWS RELEASE

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Alert: The 2018 Improving Financial Awareness & Financial Literacy Movement Spring Campaign begins in April with the 14th Anniversary of National Financial Literacy Month

2018 campaign slogan – “What’s in your financial and estate plan?”

April is the 14th anniversary of **National Financial Literacy Month** and represents the first strategic campaign venue in the **2018 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 and your organization to benefit from goodwill and new revenue opportunities, 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.

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 nor understanding why it is important to have an up-to-date financial, estate and gift plan 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 – 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.

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 – the foundation to personal finance knowledge - 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 by participating in the **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 – poor to rich, 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 **2018 Distinguished Co-Honorary Chairs for the Improving Financial Awareness & Financial Awareness Movement**



Representing Academia Thought Leadership

Janette Brown, Ed.D, Assistant Vice Provost, USC Emeriti Center, USC Davis School of Gerontology, University of Southern California. Dr. Janette Brown is the assistant vice provost for the USC Emeriti Center, adjunct faculty at the USC Davis School of Gerontology and serves as volunteer executive director for AROHE.org (Association of Retirement Organizations in Higher Education). She connects the university and community with the

valued USC retiree community and creates programs and partnerships that are interdisciplinary, multigenerational and multicultural. She provides consulting advice for universities, and has authored several books and materials for higher education organizations.



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.



Representing Financial and Legal Services Thought Leadership

Martin M. Shenkman, CPA, MBA, PFS, AEP (distinguished), JD. Marty "Marty"

Shenkman, is an estate planning attorney and Certified Public Accountant from Paramus, New Jersey. He is a widely quoted expert on tax matters and a regular source for numerous financial and business publications, including The Wall Street Journal, Fortune, Money, The New York Times, and has appeared as a tax expert on numerous television and cable

television shows including The Today Show, CNN, NBC Evening News, CNBC, MSNBC, CNN-FN and others. He has authored over 40 books and more than seven hundred articles. He is also active in numerous charitable organizations, sitting on many boards and planned giving committees and lectures regularly for these and other organizations

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 10th 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 20+ state governors signing support proclamations.

<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 valuable 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.

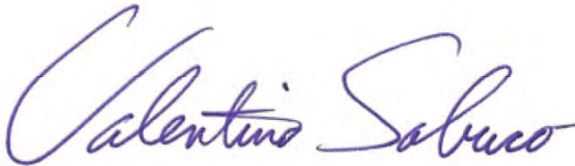


- Financial service professionals and their organizations benefit by acquiring new business from more informed and motivated clients.
- Employers benefit from having employees who are less stressed, happier and more productive.
- Nonprofits and fundraisers benefit with increased donations, planned gifts, 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, our Board of Directors, 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,



Valentino Sabuco, Executive Director
The Financial Awareness Foundation
 A 501(c)(3) Nonprofit Dedicated to Significantly
“Improving financial awareness & financial literacy...”SM

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