Background Resources

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.

1. **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/

   and **Tools & Resources** at
   http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf

2. **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

5. **Local and National Professional Contacts -** To contact financial, estate, and gift planning professionals and nonprofit professionals in your community, visit
   - **AICPA** – Find a CPA –
     - www.aicpa.org/FORT HEPUBLIC/FINDACPA/Pages/FindACPA.aspx
   - **American Academy of Attorney-CPAs** – 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
   - **Purposeful Planning Institute**
     - https://purposefulplanninginstitute.com/

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.

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(Version060917)

6. Research footnotes & links for improving financial awareness & financial literacy

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      i. http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinlliteracyEpidemic.pdf
   b. Spring Improving Financial Awareness & Financial Literacy Report & Magazine™
      i. http://www.thefinancialawarenessfoundation.org/pdf/SpringCampaignReport&Magazine.pdf
   c. Fall Improving Financial Awareness & Financial Literacy Report & Magazine ™
      i. http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf
   d. About National Financial Literacy Month
      i. http://home.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf
   e. About National Estate Planning Awareness Month/Week
      i. http://home.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf
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      i. http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf
   g. 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
   h. For the general public-Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All
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2. AICPA – 360 degrees of Financial Literacy
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3. Aegon Retirement Readiness Survey - 2015
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6. Center on Budget and Policy Priorities
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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?
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8. Council for Economic Education
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9. Consumer Financial Protection Bureau
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Improving Financial Awareness Campaigns

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.

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