

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.



The FINANCIAL AWARENESS Foundation

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

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

1. The Financial Awareness Foundation
 - a. White Paper - We Have a Lack of Financial Awareness & A Financial Illiteracy Epidemic that Requires Immediate Attention
 - i. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinIlliteracyEpidemic.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>
 - f. The Improving Financial Awareness & Financial Literacy Movement Program Planner / Overview
 - 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
 - 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-Its-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
 - b. A Guide for Advancing K-12 Financial Education
 - i. https://s3.amazonaws.com/files.consumerfinance.gov/f/documents/201703_cfpb_StateEngagementProject.pdf
10. Demographics of the United States
 - a. http://en.wikipedia.org/wiki/Demographics_of_the_United_States



News Media

Background Resources

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11. Employee Benefit Research Institute Retirement Confidence Survey
 - a. <http://www.ebri.org/surveys/rcs/>
 - b. <https://www.ebri.org/publications/facts/>
 - c. www.ebri.org/pdf/publications/books/.../DB.Chapter%2006.pdf
12. Federal Reserve Board
 - a. <https://www.federalreserve.gov/econres/feds/index.htm>
 - b. <https://www.federalreserve.gov/consumerscommunities/shed.htm>
 - c. http://www.minneapolisfed.org/publications_papers/pub_display.cfm?id=4230
 - 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. Financial Education and Empowerment Committee
 - a. STATE TREASURY PROGRAM CENSUS - By State (updated April 4, 2017).
 - b. <http://nast.org/wp-content/uploads/2017/04/Financial-Literacy-Census-April-2017-1.pdf>
15. JPMorgan Asset Management
 - a. The Millennials
 - i. https://www.jpmorganfunds.com/blobcontent/690/439/1323431015884_RI-WPMILLENNIALS.pdf
16. Jumpstart - 2015-National Standards in K-12 Personal Finance
 - a. http://www.jumpstart.org/assets/files/2015_NationalStandardsBook.pdf
17. Kaiser Family Foundation
 - a. <http://facts.kff.org/chart.aspx?cb=58&sctn=162&ch=1725>
18. Knowledge @ Wharton
 - a. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2642>
19. MasterCard Financial Literacy Index Report (2014H1)
 - a. <http://www1.mastercard.com/content/intelligence/en/research/reports/2015/mastercard-financial-literacy-index-report-2014h1.html>
20. 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>
21. NAEPC - HIGH-PERFORMANCE TEAMING & PROFESSIONAL COLLABORATION
 - a. http://www.naepc.org/assets/national/files/High%20Performance%20Teaming%20White%20Paper%202002_25_16.pdf
22. National Association of State Treasurers
 - a. <http://nast.org/financial-literacy/>
23. 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>
24. OECD's Programme for International Student Assessment (PISA)
 - a. <http://www.oecd.org/finance/financial-education/pisa-2015-results-volume-iv-9789264270282-en.htm>
 - b. <http://www.oecd-ilibrary.org/docserver/download/9817031e.pdf?expires=1496710203&id=id&accname=guest&checksum=BEE67E45D0C32125E263FFC945D66D9>
25. 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>
26. S&P Ratings Services Global Financial Literacy Survey
 - a. <https://www.mhfi.com/corporate-responsibility/global-financial-literacy-survey>
27. SEC
 - a. www.sec.gov/pdf/report99.pdf
28. SHRM Research Articles
 - a. <http://www.shrm.org/Research/Articles/Pages/default.aspx>
29. Social Security
 - a. Research
 - i. <https://www.ssa.gov/policy/>
 - b. Fast Facts & Figures
 - i. https://www.ssa.gov/policy/docs/chartbooks/fast_facts/2016/fast_facts16.pdf
 - c. Social Security – A Profile of Older Americans 2011
 - i. http://www.aoa.gov/aoaroot/aging_statistics/Profile/2011/docs/2011profile.pdf



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30. The Institute for College Access & Success - Student Deb and the Class of 2014
 - a. http://ticas.org/sites/default/files/pub_files/classof2014.pdf
31. 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>
32. 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/workpapr/wp110_9005.pdf - 2009-09-08
 - d. <http://www.census.gov/programs-surveys/acs/data.html/>
 - e. The Statistical Abstract
 - i. https://www.census.gov/library/publications/time-series/statistical_abstracts.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/>
33. US Dept of Health & Human Services
 - a. Health, United States, 2010
 - b. <http://www.cdc.gov/nchs/fastats/lifexpect.htm>
34. 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>
35. WalletHub.
 - a. The Most & Least Financially Literate States in America.
 - i. <http://wallethub.com/edu/most-and-least-financially-literate-states/3337/>
36. Wells Fargo
 - a. https://www.wellsfargo.com/press/2011/20111116_80IsTheNew65



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.

Help us do even more by making a generous tax deductible contribution to us now.

Take out your smart phone and Google **The Financial Awareness Foundation Donate Now**

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Thanks for your consideration

