

Serving as an Ambassador or Volunteer of The Financial Awareness Foundation Overview & Application

Serving as an Ambassador or Volunteer of **The Financial Awareness Foundation** can be fun and a valuable use of your time and skills, and a very rewarding experience.

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 opportunities for you and many local and national nonprofits. This can be done by actively supporting and participating within ***The Improving Financial Awareness & Financial Literacy Movement*** built around the concentrated personal finance content media blitz built around the strategic campaign venues of **Financial Literacy Month** (April) and **Estate & Gift Planning Awareness Month** (October), and other activities throughout the year.

We have a VERY BIG social challenge that requires immediate attention

As you may know most people are never taught the essential principles of smart money management and are provided with very little personal money knowledge at home or school. This leaves them vulnerable to become victims in many of their everyday money decisions, which jeopardizes almost every aspect of their lives, including their health and well-being, financial security and any hopes of financial independence or even an adequate retirement.

Just in the US, we currently have more than 10,000 people reaching age 65 daily; many will run out of money before they die. Many families are burdened with large amounts of student loans and other forms of growing debt. This lack of financial understanding has created further problems as more than ½ of our adult population don't have nor understand why they need an up-to-date financial, estate and gift plans to protect themselves and their families. And these societal problems/challenges are not limited to the US . . . they are worldwide.

Do you realize?

- 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 (that could be half your family and friends and business associates) don't have nor understand why it's important to 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 and gift planning is not just for the wealthy or elderly; it's important for everyone. With some advance planning, issues such as managing bill paying and assets in the event of sickness or disability, guardianship of children, care of a special needs child and long-term care needs, and distribution of retirement plan and other assets to the correct person(s) and nonprofit(s) at ones death can all be handled with sensitivity, care, and at a reasonable cost.
- Too many young people and their families are burdened with excessive education and other forms of debt. Student loan debt exceeds \$1.3 trillion and is the 2nd largest class of consumer debt after mortgages; members of the **class of 2016 graduated with an average of \$37,000 in student loan debt. With many legal and medical school graduates incurring debt exceeding \$150,000.**



The FINANCIAL AWARENESS Foundation

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

Improving Financial Awareness & Financial Literacy...™ (ver:021419)

959 Golf Course Drive, #273 ♦ Rohnert Park ♦ CA 94928 USA ♦ 707.586.8629

Executive Director & Publisher: Valentino Sabuco ♦ V.Sabuco@TheFinancialAwarenessFoundation.org

- 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 - will be 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. We see our money being drained by the high cost of housing, taxes, education, health care, while dealing with the uncertainty of investments and our economy. We worry about the future, or unfortunately in many cases, simply try not to think about it.

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.

The Solution / Master Plan / How Everyone Benefits

Wouldn't it be great if there is a real solution to this lack of financial awareness & financial illiteracy epidemic?

We strongly believe there is, and it revolves around better educating the general public, educators, financial service and nonprofit professionals to the essential principles to smart money management while motivating them to get and keep their financial, estate and gift plans in order. People need access to better personal financial management tools and information, to communicate and work more effectively with their financial advisors – (that includes fee-based service providers and financial product sales people), and to make better informed every day money decisions.

Supporting improving financial awareness and financial literacy is a winning opportunity for all. Working with leaders within the financial, estate and charitable gift planning industries, we have first-hand experience with the successes and challenges Americans face. The goals are to:

- Substantially improve financial awareness and financial literacy across all ages, incomes and demographic groups.
- Alert the general public why having a current and up-to-date financial, estate and gift plan is an important financial responsibility not only to themselves but to their families, loved ones, and their personal philanthropy.
- Inform and educate the general public, in an entertaining format, to the essential principles to smart personal financial management.
- Motivate the general public to take action to get and keep their financial house in order with up-to-date financial, estate and gift plans.
- Guide the general public to find to the right professionals to cost effectively implement and update their financial, estate, and giving plans.
- Educate financial service and nonprofit professionals and their organizations to better serve their clients, the general public, and potential donors.



The Strategy

The strategy is to recognize organizations and their management that are championing improving financial awareness and financial literacy. Then uniting them with other associations, organizations, nonprofits, educational institutions, municipalities, employers and the news media to actively focus their vast community resources into a growing concentrated personal finance content media blitz every six months around the strategic campaign venues of:

- **National Financial Literacy Month** – In 2004 the Senate passed Resolution 316 that officially recognized April as National Financial Literacy Month. In 2016 President Obama signed a Presidential Proclamation proclaiming April as National Financial Capability Month.
www.TheFinancialAwarenessFoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf
- **National Estate & Gift Planning Awareness Month** – In 2007 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 he 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.
www.TheFinancialAwarenessFoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf

The plan is to touch the majority of The People, 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 their financial, estate and gift plans in order.

The objective is to encourage financial / nonprofit / education professionals and their organizations, employers, municipalities, and the news media to actively participate in The Movement to alert, educate, motivate, and assist the everyone to cost effectively establish and keep their financial, estate and gift plans current; 120 million America's-half the adults; rich to poor - that don't have plans.

Semi-annually we produce a report that provides a sampling of the community participation, including supporting proclamations from 22 US state governors, leading financial service, planned giving, and nonprofit associations and their professionals, a comprehensive collection of reports including how financially literate each state and country is, and so much more.

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

We encourage you to 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 Section of Real Property, Trust and Estate Law; 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.



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, and prospects benefit by receiving personal financial and estate planning materials to improve their personal financial position and 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 money; it empowers them to make better informed productive everyday money decisions, save time and money with their financial advisors and product 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 passing on their values, knowledge and assets to future generations to make their lives and this world a better place.
- 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 benefits 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 and the world actually benefits with a stronger and financially sound economy.



This is a great opportunity to "strengthen relationships" with clients and prospects and associates, generate new revenue opportunities for financial service / nonprofit / education professionals, while producing needed gifts and bequests for many educational institutions and nonprofits. Most importantly, this also goes a long way to solving the lack of financial awareness and financial illiteracy epidemic.



Fun & Easy Ways to Help Make a Difference as a TFAF Ambassador Checklist



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.

Fun & Easy Tasks	Yes I can Do that
1. Place financial and estate and gift 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 . 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 the <i>We Support Improving Financial Awareness & Financial Literacy Co-Branded Icon</i> to your website with a link to http://home.thefinancialawarenessfoundation.org/campaigns.html	
<div style="display: flex; align-items: center; justify-content: space-around;">   <div style="text-align: right; margin-right: 20px;"> <p>Co-Brand by placing your logo here</p> </div> </div> <p style="text-align: center; margin-top: 10px;">The Financial Awareness Foundation www.TheFinancialAwarenessFoundation.org</p>	
Here's a link to download the Foundation graphic http://www.thefinancialawarenessfoundation.org/pdf/TFAF-master-IFAFL-Blue.jpg	
Here's a link to download the Co-Brandable graphic http://www.thefinancialawarenessfoundation.org/pdf/Co-brand-IFAFL-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.	
We have successfully piloted 'no-cost' community programs like what the City of Monterey and its Public Library (The oldest in California) are doing for their patrons and the Greater Monterey Bay Area Residents as a Community Gift.	



Fun & Easy Tasks	Yes I can Do that
http://www.thefinancialawarenessfoundation.org/pdf/Monterey-FPFlier_2018-031518.pdf	
http://www.monterey.org/library/Events/Financial-Awareness-Workshops	
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	
<ul style="list-style-type: none"> ◆ “Building Blocks to Successful Financial Planning” 	
<ul style="list-style-type: none"> ◆ “Building Blocks to Successful Estate & Gift Planning” 	
5. 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	
6. Provide local seminars and workshops. Encourage your local	
<ul style="list-style-type: none"> ◆ Financial Planning Association Chapter 	
<ul style="list-style-type: none"> ◆ Estate Planning Council 	
<ul style="list-style-type: none"> ◆ National Association of Charitable Gift Planners 	
<ul style="list-style-type: none"> ◆ Association of Fundraising Professionals Chapter 	
<ul style="list-style-type: none"> ◆ International Association of Advisors in Philanthropy Chapter 	
<ul style="list-style-type: none"> ◆ Society of Financial Service Professionals Chapter 	
<ul style="list-style-type: none"> ◆ Nonprofits 	
and their financial professional associates to join in with you to host or take part in community-wide programs built around personal financial and estate planning during the months of April and October in support of improving financial awareness and financial literacy.	
7. 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.	
8. Help create some fun improving financial awareness & financial literacy challenges	
<ul style="list-style-type: none"> • As to who has the best Financial Awareness 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Community Activity 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Checklist 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Article 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Campaign Slogan 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Campaign Flyer 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Website 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Other possibilities? 	
<ul style="list-style-type: none"> • As to who has the most financially literate 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Chapter / Council 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Employees 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> Members 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> City 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <input type="checkbox"/> State 	
9. Financially support these amazing, broad-based, multifaceted campaigns for improving financial	



Fun & Easy Tasks	Yes I can Do that
awareness and financial literacy by reallocating existing marketing dollars and or adding new dollars to these important biannual campaigns.	
10. Ask your State Governor and other political contacts to provide supporting proclamations for National Financial Literacy Month April and for Estate Planning Awareness Week in October. Semi-annually contact your state governor and request a supporting proclamation for	
<ul style="list-style-type: none"> • National Financial Literacy Month (April) 	
<ul style="list-style-type: none"> • Estate & Gift 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	
11. Build and schedule some of your organizations annual marketing, branding, advertising, and social media programs around these strategic venues for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your members, their organization's employees, donors, and prospects.	
12. Make contributions of your time, creativity, strategic planning, goodwill, contacts where appropriate, staff time. If you have available staff time available to let us know and make some it available for our worthy projects.	
13. Help us with our fundraising and capital campaigns.	
<ul style="list-style-type: none"> • More than ten years of planning and thousands of volunteer hours have gone into developing the strategic plans and the foundation's infrastructure along with the initial Improving Financial Awareness & Financial Literacy Movement and campaigns, content and other intellectual properties. 	
<ul style="list-style-type: none"> • Up to now The Foundation's executive team, Board, Ambassadors and the various associates are entirely a volunteer team. The Foundation has grown to the stage that it requires ongoing "hands-on" management to strategically plan, implement and manage its relationships, programs and initiatives. 	
<ul style="list-style-type: none"> • Our capitalization goals are to raise \$10 million to properly capitalize The Foundation to advance and support our campaigns and programs. We are seeking lead philanthropists and / or sponsors who see the importance of our mission and appreciate our accomplishments to-date and who will assist us by initially capitalizing us with \$1 million each along with other appropriate resources. Help us to identify and make contacts with possible philanthropists and strategic partners that can assist us on our mission. 	
<ul style="list-style-type: none"> • Start by making a charitable contribution to us today 	
http://home.thefinancialawarenessfoundation.org/donationgateway.html	
<ul style="list-style-type: none"> • Your timely financial and strategic support is requested to help us take our initial work to the next level. 	
14. We are looking for additional	
<ul style="list-style-type: none"> • Strategic partners 	
<ul style="list-style-type: none"> • Sponsors 	
<ul style="list-style-type: none"> • Volunteers and supporters and Ambassadors 	
<ul style="list-style-type: none"> • Philanthropists & donors 	
<ul style="list-style-type: none"> • Distinguished Co-Honorary Chairs for The Improving Financial Awareness & Financial 	



Fun & Easy Tasks	Yes I can Do that
Literacy Movement	
<ul style="list-style-type: none"> Board Members 	
to help with our capital campaign and improving financial awareness and financial literacy campaigns and programs. When they appear introduce them to us.	
15. Introduce others to our programs	
<ul style="list-style-type: none"> Help us introduce the Financially Green Organization Certification Program™ to employers, member based organizations, high schools, colleges and universities, and municipalities. Check out our overview through this link 	
http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf	
<ul style="list-style-type: none"> The Your financial PARTNER University / College Program™ 	
Check out our overview through this link	
http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf	
16. Help us with our technology needs	
<ul style="list-style-type: none"> Website 	
<ul style="list-style-type: none"> The Financial Knowledge Community 	
<ul style="list-style-type: none"> <input type="checkbox"/> Public Portal 	
<ul style="list-style-type: none"> <input type="checkbox"/> Nonprofit Portal 	
<ul style="list-style-type: none"> <input type="checkbox"/> Financial Service Professional Portal 	
<ul style="list-style-type: none"> CRM 	
<ul style="list-style-type: none"> Content Management Systems 	
<ul style="list-style-type: none"> Project Management Systems 	
<ul style="list-style-type: none"> eLearning Platform 	
<ul style="list-style-type: none"> Video Development & Production 	
17. Help us establish The International Improving Financial Awareness & Financial Literacy Research Center at University / College Campus near you..	
<ul style="list-style-type: none"> Advance research projects 	
<ul style="list-style-type: none"> Serve as a Think Tank 	
<ul style="list-style-type: none"> Provide classes, workshops, and conferences 	
<ul style="list-style-type: none"> Advance our personal and professional publishing activities 	
<ul style="list-style-type: none"> House The Financial Awareness Foundation 	



Becoming an Ambassador of The Financial Awareness Foundation

Being an Ambassador of The Financial Awareness Foundation is a volunteer position; we are not a membership based organization and there are no membership fees or dues that people are required to pay to be associated with TFAF or The Improving Financial Awareness & Financial Literacy Movement & Campaigns or any of our work. Ambassadors are also expected to pay for any and all of their personal and business and foundation related expenses unless indicated in writing otherwise.

We ask all our Ambassadors to

1. Assists us ON our mission to '**significantly improve financial awareness & financial literacy**'
2. Actively support and participate in **The Improving Financial Awareness & Financial Literacy Movement & Campaigns** built around the strategic venues of
 - Financial Literacy Month (April)
 - Estate & Gift Planning Awareness Month (October)
3. **Make contributions of your time**, creativity, strategic planning, goodwill, contacts where appropriate, staff time (if you have available staff time available to let us know and make some of it available for our worthy projects).
4. **Keep on the lookout** for potential volunteers, ambassadors, strategic partners, sponsors, philanthropists, donors, supporters, future board members, and when they appear introduce them to us.
5. **Assist us with our capital campaigns** by
 - Talking to others about contributing to us so we can touch more people and financial service, nonprofit and planned giving professionals - (investing with us)
 - Asking for donations to The Financial Awareness Foundation where appropriate
 - Identify sponsors and help create community matching donations during the various **Improving Financial Awareness & Financial Literacy Movement** campaign venues
 - Make when appropriate to you, personal financial contribution to TFAF
<http://home.thefinancialawarenessfoundation.org/donationgateway.html>
6. **Not sign any agreements or contracts** involving The Foundation unless you authored to do so by the Executive Director.
7. **Obey all laws and maintain high personal ethics at all times.**

The Foundation as a hard working nonprofit always appreciates monetary contributions, planned giving gifts, bequests, alternate beneficiary designations from philanthropists, individuals, sponsors, strategic partners and organizations that are looking to support important community, national, and international important causes that can '**help make this a better world**'. Your assistance in helping us with our fundraising efforts and our capital drives to advance our improving financial awareness and financial literacy movement and campaigns, programs, and publishing efforts is very much appreciated.

Our working relationship is an "at-will" relationship; you or The Foundation can terminate it at any time, with or without cause. There is no defined term or 'Climbing of the Chairs' for our Ambassadors. We are working to establish a core team of high quality thought leaders as Ambassadors that understand how fundamentally important improving financial awareness and financial literacy is and enjoy working together to help everyone to get and keep their financial, estate and gift plans current thus making our vision a reality.

To protect you and the integrity of **The Financial Awareness Foundation**, and so we do not violate any rules or laws if you do any presentations, or mailings using our name, logo, in the status as an Ambassador or making a presentation or distributing content as a representative of **The Financial Awareness Foundation** we will need to **see and approve all materials in advance**, before they are released to the press or public or used in a presentation.

I agree to the above:

Name

Date



The FINANCIAL AWARENESS Foundation

A 501(c)(3) Nonprofit Dedicated to Significantly *Improving financial awareness & financial literacy*™

TFAF Ambassadors Job Description Outline

1. Actively help improve financial awareness & financial literacy.
2. Actively participate in **The Improving Financial Awareness & Financial Literacy Movement** with its semi-annual personal finance content media blitz built around the strategic campaign venues of
 - ◆ Financial Literacy Month (April)
 - ◆ Estate & Gift Planning Awareness Month (October)with educational and motivating reminders and tools for making wise lifelong financial decisions and to get and keep your financial, estate and gift plans in order.
3. Encourage financial service professionals and their organizations that you know to join in and actively support and participate in The Movement.
4. Encourage nonprofits and planned giving professionals and their organizations in your community to join in and actively support and participate in The Movement.
5. Timely returns calls and participate in occasional strategic planning phone calls when possible.
6. Always be on the lookout for high quality future Ambassadors, Staff, Strategic Partners, Philanthropists, Donors, and Volunteers for TFAF.
7. Actively participate in TFAF capital campaigns, fund raising, grant program, and development efforts. When you meet or discover a possible and appropriate gifting or funding opportunity make an appropriate introduction or schedule a meeting with the Executive Director and or Development Officer.

If the above is acceptable to you and you would like to become a TFAF Ambassador please email us

1. Your personal backgrounder.
2. A brief statement why you would like to become a TFAF Ambassador.
3. Which **Fun & Easy Ways to Help Make a Difference as a TFAF Ambassador Checklist (on page 5-8)** interests you and that you'll attempt to do. Either note them by number on your email or just circle or check them off making any appropriate notes and include a PDF of those pages in your email to us.
4. Sign and return the previous page and this page (Pages 9 & 10) in a PDF.
5. If you would like to present our **Improving Financial Awareness & Financial Literacy Presentations** as a TFAF Ambassador please initial below and we will forward the Presentation Package to you with our No Cost License Agreement
 - ◆ **Building Blocks To Successful Financial Planning** _____
 - ◆ **Building Blocks To Successful Estate & Gift Planning** _____
 - ◆ **Help Solve the Financial Illiteracy Epidemic – While Increasing Your Bottom Line** _____

If you want to be a TFAF Ambassador and agree to the above please sign below and the previous page and email to us at admin@TheFinancialAwarenessFoundation.org

Sign Name

e Mail

Print Name

Date



The FINANCIAL AWARENESS Foundation

A 501(c)(3) Nonprofit Dedicated to Significantly *Improving financial awareness & financial literacy*™


Thank for your interesting in serving as a TFAF Ambassador; we welcome your assistance and support.

To learn more about us see the following pages or visit us at www.TheFinancialAwarenessFoundation.org and join our discussion group on [LinkedIn](#).

If you have further thoughts or require additional information or want to discuss being an Ambassador, volunteer, sponsorship, philanthropist, or providing planned gifts, contributions and grants to **The Financial Awareness Foundation** please contact me directly.

Thank you for your consideration and we look forward to working with you to help make it a better place for all.

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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Website: www.TheFinancialAwarenessFoundation.org

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Office: 707.586.8620

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



***Having better personal finance knowledge changes your world and the world around you...
FOREVER!***



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.

We serve as a nonpolitical 'financial awareness advocate' for the general public – We The People, the financial service professionals, financial product providers and their organizations, nonprofits, educational institutions, municipalities, employers and the news media.

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

- Make better informed everyday money decisions so you can
 - Live a quality life without outliving your wealth
 - Watch your personal / family dreams become a reality
 - Make decisions about your lifestyle without financial worry
 - Enjoy a financially secure debt free future
- Work with financial professionals & product providers to get the best results from their time & money
- Pass on their values, knowledge & assets to future generations to make their lives & this world a better place

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, and individuals that are championing improving financial awareness and financial literacy. We are then uniting them with other associations, organizations, nonprofits, educational institutions, municipalities, employers, and news media to actively focus their vast community resources into **The Improving Financial Awareness & Financial Literacy Movement** with its semi-annual concentrated personal finance content media blitz around the strategic campaign venues of

- **Financial Literacy Month**
- **Estate & Gift Planning Awareness Month**

The plan is to touch everyone at least twice a year through these strategic campaign venues, with educational and motivating reminders and tools for making wise informed lifelong financial decisions and to **get and keep their financial, estate and gift plans in order.**

2. The Foundation also 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 and gift planning and charitable planning needs.



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

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 are some links to provide you with further background information on us and **The Improving Financial Awareness & Financial Literacy Movement & Campaigns**.

The Financial Awareness Foundation

1. Our **Introduction 1 minute video** and website
<http://www.thefinancialawarenessfoundation.org>
2. **The Financial Awareness Foundation Fact Sheet**
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationFactSheet.pdf>
3. **The Financial Awareness Foundation Introduction**
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf>
4. **The Financial Awareness Foundation Annual Report & Business Plan**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FoundationReport&BusPlan.pdf>
5. IRS Determination Letter
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf>

The Improving Financial Awareness & Financial Literacy Movement & Campaigns

1. **The Improving Financial Awareness & Financial Literacy Movement Report & Magazine™**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
2. **The Improving Financial Awareness & Financial Literacy Movement Program Planner / Overview**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>
3. For the financial service and nonprofit professionals - **How Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-AdvisorsSupport-ImprovingFinancialAwareness-CanIncreaseYourBottomLine.pdf>
4. For the general public - **Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-PublicSupportfortheImprovingFinancialAwareness.pdf>
5. **Serving as an Ambassador or Volunteer**
<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>

TFAF Improving Financial Awareness & Financial Literacy Programs

1. **The Financially Green Organization Certification Program™ Executive Summary & Overview**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>
2. **The Your *financial* PARTNER University / College Program™ Executive Summary & Overview**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUUniversityProgramOverview.pdf>

TFAF Research

- ◆ White Papers - *We Have a Lack of Financial Awareness & Financial Illiteracy Epidemic that Requires Immediate Attention*
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinIlliteracyEpidemic.pdf>
- ◆ Wealth Advisor Confidence Survey – Executive Summary
<http://www.thefinancialawarenessfoundation.org/pdf/WealthAdvisorConfidenceSurveyExecSum2019.pdf>
- ◆ TFAF- Improving Financial Awareness & Financial Literacy Background Resources
<http://home.thefinancialawarenessfoundation.org/pdf/9-BackgroundResources.pdf>
- ◆ TFAF- Improving Financial Awareness & Financial Literacy Movement Report & Magazine
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
- ◆ TFAF- Key Financial Literacy Definitions
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinancialLiteracyDefinitions.pdf>



TFAF Complimentary Set of Personal Finance Publications

Here is a link to download the Personal Finance Publication Set. In the spirit of improving financial awareness and financial literacy you are welcome to share them with family and friends, staff and business associates as you see appropriate.

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



Here's a brief summary of this very special personal finance publication set

1. **Your financial PARTNER™ Overview – Essential Principles to Smart Money Management™** This publication provides the reader with an overview of the **Your financial PARTNER Personal Financial Management System** and also identifies the essential principles to smart money management and common mistakes to avoid – the foundation to personal finance knowledge - and places them at your fingertips.
2. **Your financial PARTNER™ – The Personal Financial Management System, Guidebook and form set** - This is more than just another source of financial information and advice. It's a complete personal financial management system - a clear step-by-step process designed to help organize your affairs and provides you with the essential principles to smart personal financial management and a comprehensive set of common mistakes to avoid. These tools empower you to
 - Make better informed everyday money decisions so you can
 - ◆ Life a quality life without outliving your wealth
 - ◆ Watch your personal / family dreams become a reality
 - ◆ Make decisions about your lifestyle without financial worry
 - ◆ Enjoy a financially secure debt free future
 - Work with financial professionals & product providers to get the best results from their time & money
 - Pass on their values, knowledge and assets to future generations to make their lives and this world a better place
3. **Your Estate & Gift Planning Organizer™** – All the tools you need to better organize, plan and manage your estate plan over your lifetime. Helps you develop and maintain a sound estate plan for you and your family. Organizing financial information is challenging for most of us. **Your Estate & Gift Planning Organizer** streamlines the estate planning process, helping you prepare your estate plan in a quick and easy manner saving you time and money.

TFAF Webinar & Community Presentations

- ◆ *Building Blocks To Successful Financial Planning* - City of Monterey and its Public Library
- ◆ *Building Blocks To Successful Estate & Gift Planning*
<http://www.monterey.org/library/Events/Financial-Awareness-Workshops>
- ◆ *Conference / Webinar Panel Discussion for Thought Leaders - Help Solve the Financial Illiteracy Epidemic – While Increasing Your Bottom Line*
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Draft-IFAFL--PanelDiscussion.pdf>

**Having better personal finance knowledge changes your world and the world around you...
FOREVER!**



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A 501(c)(3) Nonprofit Dedicated to Significantly *Improving financial awareness & financial literacy*™