The TFAF
Building Blocks to Successful Financial Planning Presentation Series & Curriculum Development

Contents

Building Blocks to Successful Financial Planning Presentation Series 1
See How Others Presented TFAF Presentations 3
Sample Slide-Decks 3
The TFAF - Personal Finance Publication Set 6
Here Are Some Examples of Special Use of the Materials… 7
Curriculum Development 9

Building Blocks to Successful Financial Planning Presentation Series

We have over fifteen dynamic and powerful scripted 90-minute PowerPoint presentations, which can be accompanied by the **TFAF - Personal Finance Publication Set,** to provide the viewer with a memorable lifelong learning experience, along with

- The tools to making lifelong informed financial decisions.
- A systematic approach to better managing their finances.
- Crafting an updateable personal financial plan to serve as your roadmap to a successful life & career

They have been used domestically and internationally as content for classroom interaction, webinars and conferences, regional and community workshops, and as in-house employee and member benefits improving financial awareness and financial literacy programs. They are entitled

#1 - Introduction to

- **Rethinking Personal Finances - The Building Blocks to Successful Financial Planning Presentation Series** This contains some very important messages about why improving financial awareness and financial literacy are so VERY important, along with an introduction to the essential principles of smart money management – the foundation of personal finance knowledge. They can be expanded or compacted as required.

#2 & #3 - Building Blocks to Successful Financial Planning

- Part 1 – Getting Organized
- Part 2 – The Essential Principles of Financial Planning

#4 - Building Blocks to Successful Estate & Gift Planning

#5 - #15 – The Elements

- **In-depth training for each of the 11 Elements shown on The FA Infinity Lifelong Learning Symbol**

The FINANCIAL AWARENESS Foundation
A 501(c)(3) Nonprofit Organization Dedicated to Significantly
Improving Financial Awareness & Financial Literacy…™
959 Golf Course Drive, #273 ♦ Rohnert Park ♦ Sonoma County ♦ CA 94928 - (version 071923)

Our presentations aim to improve the viewer's financial lifestyle by providing an easy-to-use, systematic approach to personal financial management, introducing the viewer to the secrets of smart money and the **Essential Principles of Smart Personal Money Management** – the foundation of personal finance knowledge. The presentations are designed to provide the viewers with very important 'life skills" most often not taught at home and school, thus **empowering the viewers** to:

- Make wiser informed lifelong money decisions
- Work more efficiently with financial professionals & product providers to get the best results from time & money
- Get and keep their financial house in order by having current financial, estate and gift plans
- Pass on values, knowledge, and assets to future generations, and charitable causes, and help end inherited poverty while making this a better world for all
- Have the highest probability to reach and maintain their family dreams while living out a financially successful life.

Once **The Essential Principles of Smart Personal Money Management** are shared you can use this platform to present:

An unlimited amount of **Life Event Programs and Workshops**, such as:

- Acing the job interview
- Renting an apartment
- Buying a car
- Starting a business
- Buying a house
- A financial agenda before marriage
- Financially educating kids
- Caring for elders
- Funding education costs
- …

Additional **Key Life Skills** to Advance Careers, such as

- Problem Solving – Making things better,
- Creativity – Thinking outside the box
- Collaboration & Project Management
- Diversity & Inclusiveness
- Neutral / Open Mindset
- Believing in Oneself
- Building Your Social Capital
- Ethic – Doing the right thing can be profitable, and so can giving back
- Being capitalistic isn't just about making money for yourself
- Taking Responsibility
- Leadership / Collaboration - Iron Sharpen Iron
- Additional Life Skills to advance your careers
- Relevant Computer Skills for you personally and in your job market
- Job interviews & CV development
- Marketing your business and climbing the corporate latter
- Ways to identify and market Financial Services & Financial Product

Please contact us for assistance, customizing, and additional subjects.

See How Others Presented TFAF Presentations

Sample Slide-Decks

Here are two sample slide decks from our Presentation #1; **Introduction – The Building Blocks to Successful Financial Planning,** from **USC** and **The International Improving Financial Awareness & Financial Literacy Association (The FA Association) at the University of Ghana for their faculty and staff, and UGBS Community**

https://home.thefinancialawarenessfoundation.org/pdf/DraftSlides1of4.TFAF-KLS-Emeriti-BBSFP-Intro-2020.pdf

https://www.home.thefinancialawarenessfoundation.org/pdf/TFAF-BBSFP.Intro-UGBS.pdf

Here are two sample slide decks from our Presentation #4; from **USC** and **The International Improving Financial Awareness & Financial Literacy Association (The FA Association)** at the **University of Ghana for their Alumni Association**

https://home.thefinancialawarenessfoundation.org/pdf/DraftSlides4of4.TFAF-KLS-Emeriti-BBSEGP.pdf

https://home.thefinancialawarenessfoundation.org/pdf/TFAF-FAAssocSlides-UGBSAlum-BuildingBlock-EP-4 of4.pdf

Our presentations are designed to be very flexible and can be branded and customized. With appropriate editing adjustments, the **TFAF Presentation Set** can generate several presentation formats and lengths to accommodate different time slots and audiences.

Each presentation can start with a brief opening and closing comments from an organizational dignitary, and a few housekeeping comments from an announcer, with a question and answer (Q & A) session, with closing comments by the Moderator or a presenting host dignitary.

The ideal audiences for these presentations include High School Students and above

- Primary or Secondary or College Teachers, Professors, Lecturers and Administrators
- Graduating Classes – High School, College, University, Trade Associations
- Alumni Groups
- Employee Groups
- Nonprofit organizations
- Service Clubs
- Young Professionals
- Female Groups
- Male Groups
- Athletes, Celebrities
- Retirees, Soon be Retirees
- Municipality and Community Leaders, Politicians, and Law Makers
- Other Associations & Special Interest Groups

These valued presentations and accompanying materials can be used in classrooms, webinars, workshops, community offerings, as group financial planning, that can be recorded and presented on demand, or as part of a radio, television, or PBS broadcast. Advanced and more comprehensive versions of these can also be used as training tools for financial service professionals and financial product providers.

You can use this presentation any time of the year, along with being offered in support of **The Improving Financial Awareness and Financial Literacy Movement** during the strategic campaign venues celebrating

- **April known as Financial Literacy Month**, and six months later as
- **October known as Estate & Gift Planning Awareness Month**

https://home.thefinancialawarenessfoundation.org/pdf/TFAF-PublicSupportfortheImprovingFinancialAwareness.pdf

https://home.thefinancialawarenessfoundation.org/pdf/TFAF-TheYouthMovementConceptNote.pdf

https://home.thefinancialawarenessfoundation.org/pdf/TheMovementWorldWide.pdf

These presentations are also designed to use **The Financial Awareness Foundation's** complimentary – The **TFAF - Personal Finance Publication Set** as a syllabus and audience gift takeaway tool, but it is not required.

With advanced notice, **The Financial Awareness Foundation's** materials can be co-branded with the partnering organization's branding and contact information. You can download a complimentary copy by clicking on this link or the graphic of the **TFAF- Personal Finance Publication Set.**

The TFAF - Personal Finance Publication Set

https://home.thefinancialawarenessfoundation.org/publications.html

Your *financial* PARTNER Overview - Essential Principles to Smart Personal Money Management

Identifies the essential principles of smart personal financial management as well as an overview of the Your *financial* PARTNER System.

Your *financial* PARTNER Guidebook

Be more confident about your financial future! A 'Life Changing' Book that is a complete personal financial management system, a clear step-by-step process designed to help organize your financial affairs and learn smart money secrets and the essential principles of smart money management giving you all the tools to help make your dreams become a reality.

Your *financial* PARTNER – Financial Plan Forms Set

Included with Your *financial* PARTNER Guidebook are over 50 unique forms to help you craft your personal financial, estate and gift plan, and help make your financial dreams come true.

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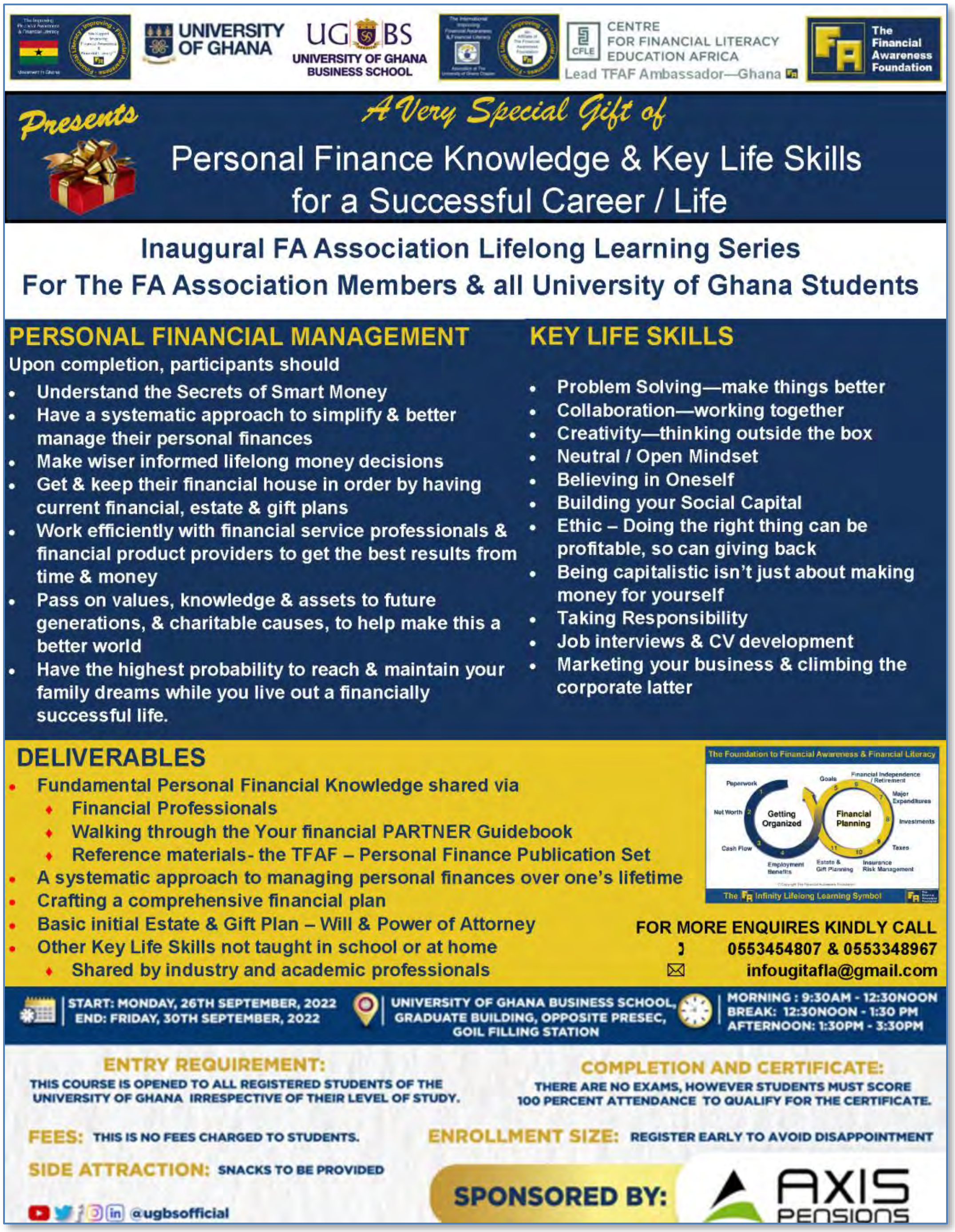
Your Estate & Gift Planning Organizer

All the tools you need to better organize, plan and manage your estate and gift plans. Organizing financial information is challenging for most of us. Your Estate & Gift Planning Organizer streamlines the estate and gift planning process, helping you prepare and manage your estate and gift plans quickly and easily saving you time and money.

We believe that EVERYONE needs to be financially literate and empowered to make better everyday money decisions. If not how are they going to have any chance of living out a quality life, reaching and maintaining their personal and family financial dreams, and enjoy a debt-free and secure financial future, passing on values, knowledge and assets to future generations, and charitable causes to help make this a better world? Without this empowerment, many many people become a burden on family and friends, employers, local nonprofits, and the ultimate safety net of the local and national government.

Here Are Some Examples of Special Use of the Materials….

A Very Special Gift of Personal Finance Knowledge & Key Life Skills for a Successful Career & Life



To kick off ***Estate & Gift Planning Awareness Month*** The FA Association accomplished something very special at the University of Ghana, by proving the student members of our *The International Improving Financial Awareness & Financial Literacy Association, University Ghana Chapter* (**The FA Association**) and UG Graduating Students …

The Special Gift of Personal Finance Knowledge & Key Life Skills for a Successful Career & Life

On Monday and Tuesday, Ghana financial professionals presented and walked the attendees through the Your *financial* PARTNER Guidebook, chapter by chapter completing a basic set of forms to provide them with

- Personal financial knowledge
- A systematic approach to managing their finances
- **Their first Personal Financial Plan**

Wednesday, an alumnus of the University of Ghana, an estate planning attorney, guided the attendees in crafting their first **Will and Power of Attorney** - as a part of their Estate and Gift Plan!!!

Here is the Whatsapp exchange we received...

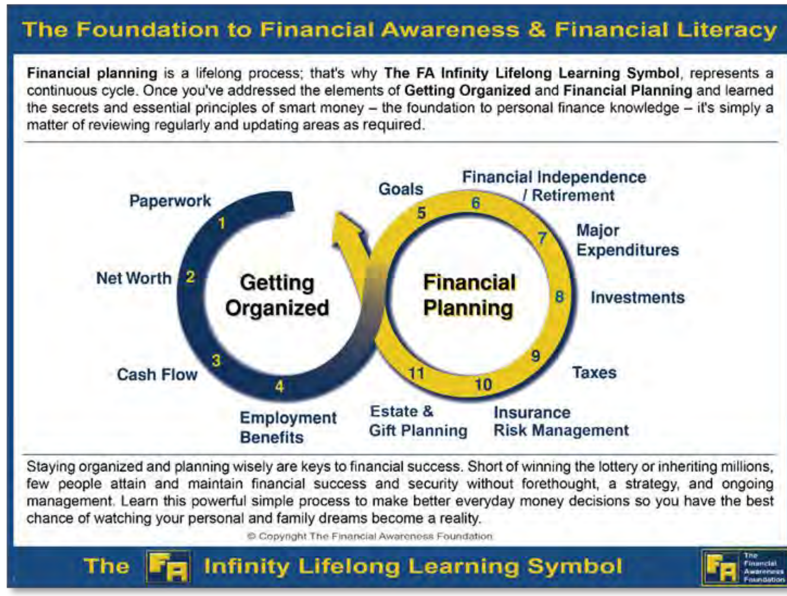
[8:22 AM, 9/28/2022] Valentino: Greetings and good afternoon Prof Benjamin, Hope you are doing well and are having a nice day. How did the Estate and Gift Planning presentation go today? How was Anita? did the attendees like her efforts?
[9:54 AM, 9/28/2022] Benjamin Amoah: Excellent
[9:55 AM, 9/28/2022] Benjamin Amoah: She did a great job, she knows her stuff and trade very well. Very much, some of them said they would pursue law as a profession etc. The actual photos would come out hopefully by next week
[9:58 AM, 9/28/2022] Valentino: EXCELLENT!!! Fantastic Prof Benjamin!!!! This is a BIG deal!!!

We believe this is the first time a group of graduating students were helped to craft their own personal financial and estate plans!!! anywhere!!!

Thursday and Friday, the students were presented with a collection of Other Key Life skills - not commonly taught at home and school - for a successful career/life by university faculty, and community leaders. They included topics such as

- Job interviews & CV development
- Problem Solving – Making things better,
- Creativity – Thinking outside the box
- Collaboration & Project Management
- Diversity & Inclusiveness
- Neutral / Open Mindset
- Believing in Oneself
- Building Your Social Capital
- Ethic – Doing the right thing can be profitable, and so can giving back
- Being capitalistic isn't just about making money for yourself
- Taking Responsibility
- Leadership / Collaboration - Iron Sharpen Iron
- Additional Life Skills to advance your careers
- Relevant Computer Skills for you personally and in your job market
- Marketing your business and climbing the corporate latter
- Ways to identify and market Financial Services & Financial Product

Curriculum Development



If you are seeking a comprehensive personal financial management curriculum for your

- Secondary School
- Higher Education (Tertiary, College, & University Education)
- Employees as valued employee benefit – Group Financial Planning
- Financial Service Professionals or Financial Product Providers as a Comprehensive Training Program
- Members as a 'valued member benefit'

you may wish to consider using our **Your *financial* PARTNER Guidebook** as the core content and textbook. This can be accompanied by the 14 Module Building Block to Successful Financial Planning Presentation Series, or expanded or contracted as the scheduling permits. This can also be recorded by a team of alumni / local, financial service professionals and viewed on demand; then followed up with live in-person/online workshops or individual coaching/planning sessions with qualified professionals.

As you can see from the following table of contents it follows **The FA Infinity Lifelong Learning Symbol** and elements nicely, providing the viewers with a valuable and often overlooked life skill.

Your *financial* PARTNER Table of Contents

Action Forms Directory . . . vi
Preface . . . ix
Some Questions to Ponder . . . xi
Introduction: Welcome to *financial* PARTNER . . . 1
☐ Do I Need a Lot of Money to Make Planning Worthwhile? . . . 2
☐ What About the Things I'm Already Doing? . . . 2
☐ Getting Acquainted . . . 3
☐ How Do I Begin? . . . 3
☐ Look for *financial* PARTNER Icons . . . 4
☐ How Is *financial* PARTNER Organized? . . . 4
☐ Planning for Life . . . 6
☐ An Answer, and a Beginning . . . 6
☐ Registration . . . 7
☐ The Future Starts Right Now . . . 9
Part I — Getting Organized . . . 11
CHAPTER 1: Organizing Your Paperwork Is Important 15
☐ Moving Past the Paperwork . . . 15
☐ Common Mistakes to Avoid . . . 15
☐ A Preview of What You Will Be Doing . . . 16
☐ Start Your Things to Do List . . . 17
☐ Gather Primary Documents . . . 18
☐ Set Up Your Personal Filing System . . . 20
☐ Protect Your Personal Identity . . . 23
☐ Organize Your Personal & Family Data . . . 24
☐ Outline Your Family Tree . . . 26
☐ Building & Tracking Your Social Capital . . . 27
☐ Select Your Financial Service Providers . . . 27
☐ Obtain Your Credit Report & Score . . . 30
☐ Let's Review the Essential Principles. . . . 32
CHAPTER 2: Know Where You Stand . . . 33
☐ The Journey Begins Where You Are . . . 34
☐ Common Mistakes to Avoid . . . 34
☐ A Preview of What You Will Be Doing . . . 34
☐ Getting to the Big Issues . . . 34
☐ An Overview of the Schedules . . . 35
☐ Net Worth Statement . . . 36
☐ Inventory Your Assets . . . 40
☐ List Your Liabilities . . . 63
☐ Determine Your Net Worth & Track Your Progress . . . 70
☐ Let's Review the Essential Principles. . . . 73
CHAPTER 3: Gain Control of Your Cash Flow . . . 75
☐ Finding the Balance That Works for You . . . 75
☐ Common Mistakes to Avoid . . . 76
☐ A Preview of What You Will Be Doing . . . 76
☐ Cash Flow Management System . . . 76
☐ Ways to Increase Savings . . . 80
☐ Debt Reduction Strategies . . . 85
☐ Create & track Your Cash Flow Plan . . . 85
☐ Create a System for Handling Your Money . . . 88
☐ Introduce Your Children to Personal Finance . . . 90
☐ Let's Review the Essential Principles. . . . 92
CHAPTER 4: Make the Most of Your Employment Benefits . 93
☐ Maximizing What Your Employer Offers . . . 93
☐ Common Mistakes to Avoid . . . 95
☐ A Preview of What You Will Be Doing . . . 95
☐ Summarize Your Employment Benefits . . . 94
☐ Tax Treatment of Benefits . . . 98
☐ Let's Review the Essential Principles. . . . 98
Part I Getting Organized Overview . . . 99
Part II — Financial Planning - The Essential Principles . . . 101
☐ The Whole Picture . . . 103
☐ Why Develop a Financial Plan? . . . 104
☐ Why Do People Avoid Financial, Estate & Gift Planning? . . . 105
☐ Procrastination . . . 105
☐ Understand the *financial* PARTNER Planning System . . . 106

iv

CHAPTER 5: Goal Setting 109
☐ Let Yourself Be Guided by Goals 109
☐ Common Mistakes to Avoid 110
☐ A Preview of What You Will Be Doing 110
☐ Define What Really Matters 110
☐ It's Your Dream 112
☐ Let's Review the Essential Principles. 112

CHAPTER 6: Financial Independence/Retirement Planning 113
☐ Approach Your FIR 113
☐ Common Mistakes to Avoid in Retirement Planning 114
☐ A Preview of What You Will Be Doing 114
☐ Going Through the Six-Steps 117
☐ Financial Independence/Retirement Savings Projections 120
☐ Let's Review the Essential Principles. 124

CHAPTER 7: Major Expenditure Planning 125
☐ Plan Ahead for Your Major Expenditures 125
☐ Common Mistakes to Avoid with Major Expenditures 126
☐ A Preview of What You Will Be Doing 126
☐ Major Expenditure Prioritizer 127
☐ Going Through the Six-Steps 128
☐ Let's Review the Essential Principles. 129

CHAPTER 8: Investment Planning 131
☐ Begin Your Investment Planning Now 131
☐ Common Mistakes to Avoid in Investment Planning 132
☐ A Preview of What You Will Be Doing 132
☐ Understanding Investing 133
☐ Assessing Your Risk Tolerance 137
☐ Asset Allocation 140
☐ What Investments Are Best for You? 144
☐ Going Through the Six-Steps 145
☐ Investment Policy Statement & Plan 146
☐ Let's Review the Essential Principles 148

CHAPTER 9: Tax Planning 149
☐ Reduce Your Taxes 149
☐ Common Mistakes to Avoid in Tax Planning 150
☐ A Preview of What You Will Be Doing 150
☐ Going Through the Six-Steps 151
☐ Lower Income Taxes 153
☐ Tax Planner 154
☐ Let's Review the Essential Principles. 157

CHAPTER 10: Insurance / Risk Mgt Planning 159
☐ Review Your Insurance Policies 159
☐ Common Mistakes to Avoid in Insurance / Risk Mgt. Planning 160
☐ A Preview of What You Will Be Doing 160
☐ Two Kinds of Insurance 160
☐ Going Through the Six-Steps 163
☐ Insurance Policies Summary 164
☐ Life Insurance, Disability & Long-Term Care Needs 166
☐ Let's Review the Essential Principles. 170

CHAPTER 11: Estate & Gift Planning 171
☐ Address Your Estate & Gift Plan 171
☐ Common Mistakes to Avoid in Estate & Gift Planning 172
☐ A Preview of What You Will Be Doing 172
☐ Learning the Basics–An Estate & Gift Planning Overview 173
☐ Going Through the Six-Steps 178
☐ Estate & Gift Plan Goals & Documents Outline 180
☐ Estate & Gift Planning Location Sheet 183
☐ Let's Review the Essential Principles. 184

Part II Overview & Summary 185
Celebrate Your Accomplishments 193
Glossary .... G 1
International Appendix .... G 17
Donor Contribution Form .... G 23

v

These curriculum materials empower the students/attendees with priceless 'life skills", not taught in most homes and schools. They alert, create awareness, and motivate the students/attendees to become more financially aware while they provide financial literacy education by sharing the secrets of smart money and the Essential Principles to Smart Personal Money Management – the foundation of personal finance knowledge.

These special empowerments are designed to help the students/attendees

- Make wiser informed lifelong money decisions
- Live a quality life without outliving your wealth
- Watch personal / family dreams become a reality
- Enjoy a financially secure debt-free future
- Work efficiently with financial service professionals & financial product providers to get the best results from time & money
- Get & keep your financial house in order by having current financial, estate & gift plans
- Saves time and money with a systematic approach to managing their finances
- Pass on your values, knowledge & assets to future generations, & your charitable causes, to help make this a better world
- Have the highest probability of reaching & maintaining your family dreams while living a financially successful life.

We strongly believe that EVERYONE needs to be financially literate and empowered to make better everyday money decisions. If not how are they going to have any chance of living out a quality life, reaching and maintaining their personal and family financial dreams, and enjoy a debt-free and secure financial future, passing on values, knowledge, and assets to future generations and charitable causes to help make this a better world? Without this empowerment, many many people become a burden on family and friends, employers, local nonprofits, and the ultimate safety net of the local and national government.

Should you have any questions or require any additional information, or just want to discuss your situation please contact us.

Stay safe and healthy – there's lots of work to do and fun to be had!!!

Wishing you all the very best,

Valentino

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We believe having better personal finance knowledge changes your world and the world around you… FOREVER!