



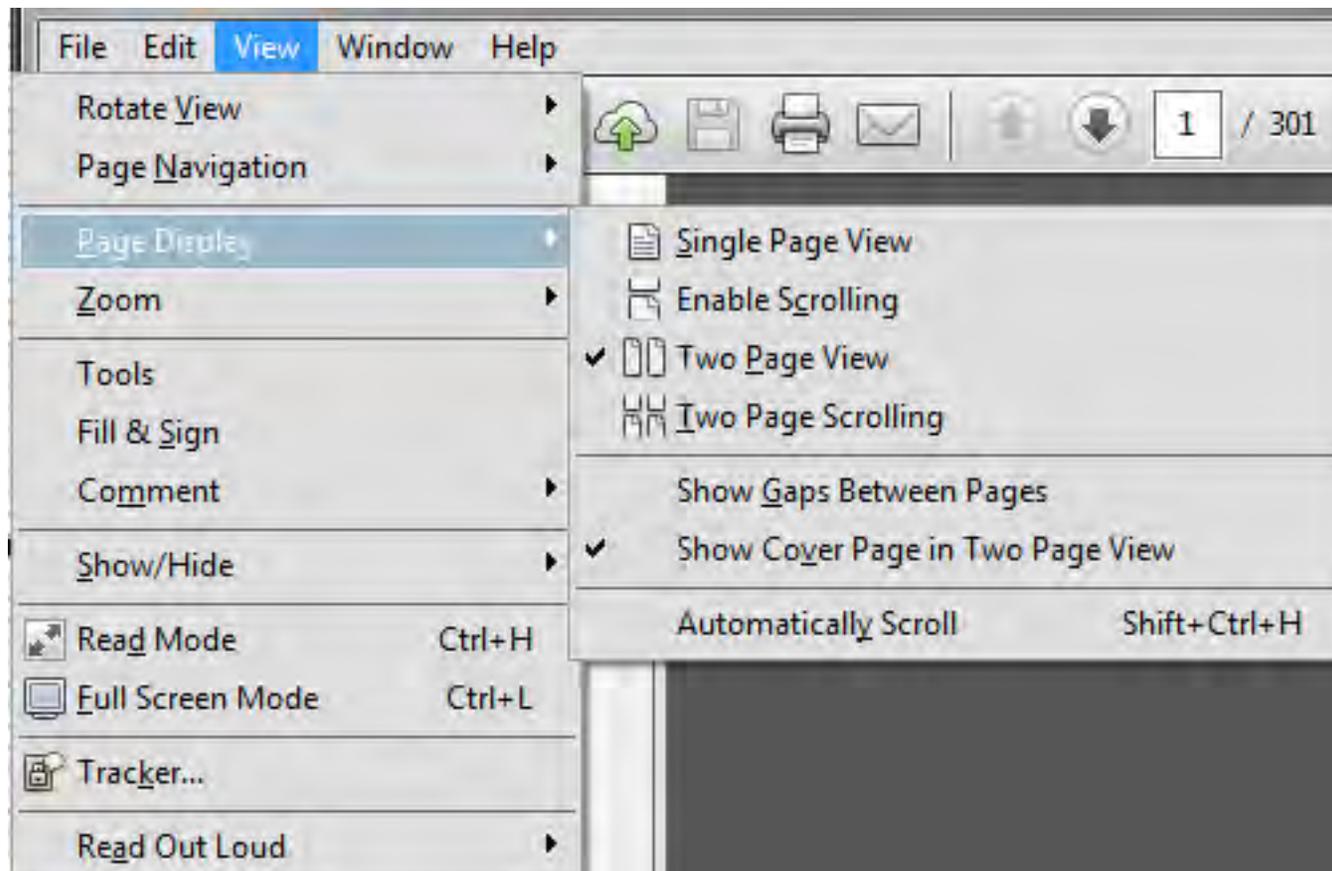
# Improving Financial Awareness & Financial Literacy Movement™ Program Overview / Planner



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# Welcome to Improving Financial Awareness & Financial Literacy Movement Program Overview / Planner

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## Improving Financial Awareness & Financial Literacy Movement Program Overview / Planner

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 revenues opportunities for you and many nonprofits. This can be done by actively supporting and participating within the semiannual personal finance content media blitz built around the strategic campaign venues of **Financial Literacy Month** (April) and **Estate & Gift Planning Awareness Month** (October).

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 consumer debt, and more than half of our adults not having nor aware of the importance of having up-to-date financial, estate, and gift plans to protect themselves and their families, **we have a serious problem**. This lack of financial awareness and financial literacy places a **HUGE** growing amount of pressure on families and friends, employers, nonprofits; as well as the local, state, and federal government.

### We Have A Serious Problem that Requires Immediate Attention

#### Many people don't realize that

- 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 don't have nor realize the importance of having a current financial and 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 planning is not just for the wealthy and elderly; it's important for everyone.
- Too many young people and their families are burdened with excessive education and other forms of debt.
- 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 – is being 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.

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.

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.

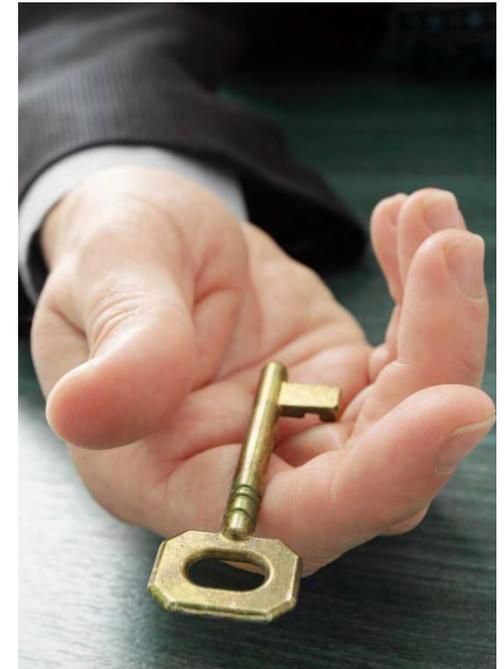
To learn more about this epidemic review our white paper ***We Have a Lack of Financial Awareness & Financial Illiteracy Epidemic that Requires Immediate Attention***

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinlliteracyEpidemic.pdf>



## We can use your assistance.

We realize that you may not be a financial service or nonprofit professional, but as a concerned individual / organization you can encourage your associates, employees, clients, donors and prospects to think about their personal financial and estate planning to improve for their future. A thoughtful and engaged individual is one who has planned financially and understands where he or she is and is going financially, and what they can do today and in their future. Encouraging and teaching financial literacy and the key essential principles to smart financial management are critical to the future economic health of the country, nonprofits, and the general public. People need to be empowered to communicate and work more effectively with their financial advisors and to make better informed and productive everyday money decisions.



## 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 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.

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 building semiannual financial awareness programs to touch the vast majority of the general public. This can be accomplished with the subtle **concentrated personal finance content media blitz** around the strategic campaign venues of:

- Financial Literacy Month (NFLM - April)
- Estate & Gift Planning Awareness Month (NEPAM - October)

The plan is to touch the majority of the general public, high net worth individuals, 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.

The objective is to encourage you and other financial / nonprofit / education professionals and their organization employers, municipalities, and the news media to actively participate in this movement to alert, educate, motivate, and assist everyone to cost effectively establish and keep their estate and financial plans and gifting plans current. 310 million America's-half the adults; rich to poor - don't have plans, that's a lot of quality business for the financial service and nonprofit professionals!

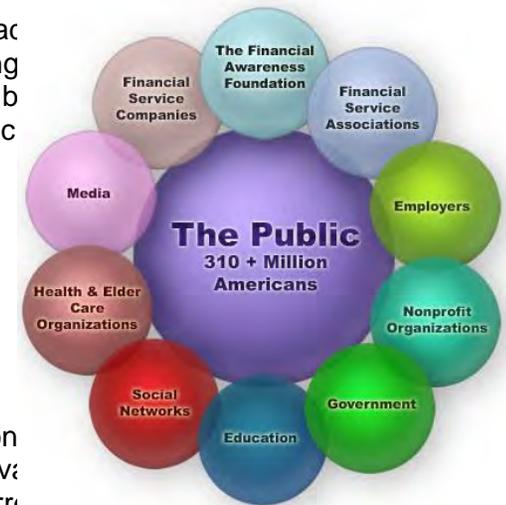
Below is a link to our annual **The Improving Financial Awareness & Financial Literacy Report & Magazine**. This provides a sampling of the community participation, including supporting proclamations from 22 US State Governors, leading financial service, planned giving, and nonprofit associations and their professionals, and academia and news media efforts along with 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>

For The People - The General Public –

**\* Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All**

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-PublicSupportfortheImprovingFinancialAwareness.pdf>



For financial service professionals

**\* Learn how The Improving Financial Awareness & Financial Literacy Movement Can Increase Your Bottom Line**

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Advisors-CanIncreaseYourBottomLine.pdf>

Our Foundation also delivers and develops exceptional educational content and programs for We The People - the general public – rich to poor, and for financial service, nonprofit, and charitable gift planning professionals, and educational institutions that support the public's financial and estate and gift planning and charitable planning needs.

**\* Community Wide Programs**

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.

These can also be used with associations, membership organizations and employers.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>

**\* Improving Financial Awareness & Financial Literacy Programs for Universities and Colleges**

We've successfully piloted programs at the University of Miami - School of Law for its graduating class, the student athletes at Sonoma State University to its graduating athletes, and (USC) University of Southern California Emeriti College, and Miami Dade College. In 2019 at Makerere University in Uganda we established the first International Improving Financial Awareness & Financial Literacy Research Center; Makerere University is the largest University in Uganda with a student enrollment of 35,000. We hope to globally link together universities and colleges through research centers like this.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUUniversityProgramOverview.pdf>

**\* Global financial literacy initiatives are increasing** and we are contacted regularly for assistance, content and ideas from around the world. In 2018 we began The Improving Financial Awareness & Financial Literacy Movement in East Africa. This will touch ~ 150 million people; modeled after our work in the US. And in 2020 are working on programs in Ghana, Brazil and India; and are in discussions with a half-dozen other countries.

[www.thefinancialawarenessfoundation.org/pdf/TFAF-Africa-TIFA-FLM.pdf](http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Africa-TIFA-FLM.pdf)

and now have Movements evolving in five continents.



## 2020 The Improving Financial Awareness & Financial Literacy Movement Distinguished Co-Honorees

Each year we recognize and honor a distinguished group of hard working 'Thought Leaders' for their outstanding individual efforts in improving financial awareness and financial literacy. It gives us great pleasure to recognize this year's Co- Honorees representing Thought Leadership in Academia, Financial Services, News Media and Nonprofits are

 <p>The International Improving Financial Awareness &amp; Financial Literacy Research Center at Makerere University</p>  	<p><b>Representing Academia Thought Leadership</b> <b>The International Improving Financial Awareness &amp; Financial Literacy Research Center at Makerere University – Kampala Uganda</b></p> <p><b>Dr. Winston Tumps Ireeta, Chairperson / Counselor</b> <a href="http://governance.mak.ac.ug/university-council">http://governance.mak.ac.ug/university-council</a></p> <p><b>Dr. David Ddumba, Founding Executive Director / CEO</b> <a href="http://math.mak.ac.ug/node/106">http://math.mak.ac.ug/node/106</a></p> <p><b>Dr. Juma Kasozi, Vice Executive Director</b> <a href="http://math.mak.ac.ug/Juma-Kasozi">http://math.mak.ac.ug/Juma-Kasozi</a></p> <p><b>Ammex Ssebidde, Founding Chief Operating Officer (COO), Alumni Makerere University, Executive Director – Mercy-Giving</b> <a href="https://www.mercy-giving.org/">https://www.mercy-giving.org/</a></p> <p>Over the last year these fine gentlemen have been working on creating The International Improving Financial Awareness &amp; Financial Literacy Research Center at Makerere University – Kampala Uganda. The Research Center will be taking a leadership role in rolling out</p> <ul style="list-style-type: none"><li>• The Improving Financial Awareness &amp; Financial Literacy Movement in Uganda <a href="https://www.mercy-giving.org/pdf/TFAF-TIFA-FLMovement-Uganda-ExecSum.pdf">https://www.mercy-giving.org/pdf/TFAF-TIFA-FLMovement-Uganda-ExecSum.pdf</a></li><li>• The Improving Financial Awareness &amp; Financial Literacy University Program at Makerere University</li></ul>
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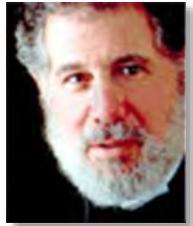


**Representing Financial Services Thought Leadership**

<https://www.aboutschwab.com/carrie-schwab-pomerantz>

**Carrie Schwab-Pomerantz, Board Chair and President, Charles Schwab Foundation, Senior Vice President, Charles Schwab & Co., Inc. & Board Chair, Schwab Charitable**

Carrie Schwab-Pomerantz, CFP®, is a leading advocate for financial literacy and one of America's most trusted sources for financial advice. She has devoted her career to helping men and women from all walks of life achieve financial security. In addition, she oversees Schwab's corporate philanthropy and employee volunteer programs, which aim to strengthen the communities where Schwab operates.



**Representing News Media Thought Leadership**

<https://www.leimberg.com/about/SteveLeimberg.html>

**Stephan R. Leimberg, CEO of Leimberg and LeClair, Inc.,**

Stephan R. Leimberg is CEO of Leimberg and LeClair, Inc., an estate and financial planning software company and publishing and software company in Bryn Mawr, Pennsylvania.

Stephan is also the Publisher of Leimberg Information Services, Inc. which provides e-mail based news, opinion, and information for tax professionals, and the author of numerous books on estate, financial, and employee benefit and retirement planning and a nationally known speaker.



**Representing Nonprofit Thought Leadership**

<https://www.aztreasury.gov/treasurer-kimberly-yee>

**Kimberly Yee, Treasurer State of Arizona**

The Honorable Kimberly Yee serves as the 36th Treasurer of Arizona and as Arizona's chief banking and investment officer. A longtime advocate of financial literacy, she passed laws during her legislative tenure to require the state's academic standards to include financial education benchmarks in grades K-12 and developed a state seal on high school diplomas earned by students who master proficiency in personal finance. Treasurer Yee was also instrumental in the passing of a bill requiring AZ schools to teach financial literacy and money management as part of the required economics credit needed to graduate from high school.



<https://www.azecon.org/our-team.html>

**Elena Zee, President and CEO of the Arizona Council on Economic Education**

Elena is very passionate about education, professional development, economic empowerment, and international exchange. She is also a Certified Financial Planner™ and has taught financial planning and economics at universities. The Arizona Council on Economic Education (ACEE), a 501(C)(3) nonprofit dedicated to improving economic and personal financial literacy in Arizona, serves over 1,800 schools across 104 cities in Arizona.

They are strong supporters and advocates for improving financial awareness and financial literacy and excellent role models within their respective industries; please follow and encourage your colleagues to do the same.



## How You Benefit

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, 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***

## Fun Ways to Participate in The Improving Financial Awareness & Financial Literacy Movement & Campaigns

We've assembled the following collection of tools to assist you, your 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.

1. Place financial and estate 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**; and encourage your readers to get and keep their financial, estate and gift plans up to date. 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](http://www.TheFinancialAwarenessFoundation.org)

- \* Sample Estate Planning Article (.pdf) <http://home.thefinancialawarenessfoundation.org/pdf/5-3-SampleEPArticle.pdf>
- \* Graphic for Estate Planning Article (.jpg) <http://home.thefinancialawarenessfoundation.org/pdf/5-2-Graphic-EPArticle.jpg>
- \* Sample Estate Planning Article-Text (.docx) <http://home.thefinancialawarenessfoundation.org/pdf/5-1-SampleEPArticle-Text.docx>
- \* Sample Financial Planning Article (.pdf) <http://home.thefinancialawarenessfoundation.org/pdf/6-3-SampleFPArticle.pdf>
- \* Graphic for Financial Planning Article (.jpg) <http://home.thefinancialawarenessfoundation.org/pdf/6-2-Graphic-FPArticle.jpg>
- \* Sample Financial Planning Article.docx <http://home.thefinancialawarenessfoundation.org/pdf/6-1-SampleFPArticle-Text.docx>



2. **Add this icon to your website** with a link to <http://home.thefinancialawarenessfoundation.org/campaigns.html>



Co-Brand by placing your logo here

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 patrons 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.

You can see a version of the ***Building Blocks to Successful Financial Planning*** that was performed with by

Local financial service professionals from the City of Monterey in conjunction with the **City of Monterey and its Public Library** made this presentation to their patrons and all Monterey Residents as a community gift.

<http://www.monterey.org/library/Events/Financial-Awareness-Workshops>

You can see a version of the ***Building Blocks to Successful Estate & Gift Planning*** that was recorded with

Local financial service professionals from the City of Monterey in conjunction with the **City of Monterey and its Public Library** made this presentation to their patrons and all Monterey Residents as a community gift.

[http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Monterey-FinLiteracyPresFlier\\_Octr4-2017.pdf](http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Monterey-FinLiteracyPresFlier_Octr4-2017.pdf)

<http://www.monterey.org/library/Events/Financial-Awareness-Workshops>

**American Endowment Fund (AEF)** live during National Estate Planning Awareness Week

<http://aefonline.actonsoftware.com/acton/rif/9733/s-00ca-1410/-/l-ctx-201348054:0/ctxf-201348054-F-0367/showPreparedMessage?sid=FHcWj1aXt>

Here are some comments left on a presentation survey:

- ✓ Very informative. You have changed my thought process regarding estate planning. This will be a topic of discussion in my family very soon. Thank you.
- ✓ A very good attempt to simplify complex estate planning information. Thank you!
- ✓ I think the seminar was fine. But I already had this material under control. I do admit I never thought of what to do with my 5 cats if my wife and I were both to die! That was a new idea.
- ✓ I attended as a development staff member of a nonprofit foundation and learned a lot about what our prospective donors should be doing with regard to planning. Also, it was a good reminder for myself.
- ✓ Very well done. A lot of useful information packed into one hour!
- ✓ Great motivation! Would like to share with supporters of our non-profit. Is there a recording of it we can share? Thanks!
- ✓ Great job. I like that your materials focused on HOW to do estate planning, not just understanding it.

We can work with you to do something like this with and for your organization. We have scripted public presentations that you can be easily customized and branded that are entitled

- “Building Blocks to Successful Financial Planning”
- “Building Blocks to Successful Estate & Gift Planning”

5. **Consider participating in one of our programs designed to increase your bottom line while you help solve a major social challenge.**

We are advancing programs for employers, municipalities, high schools, colleges and universities. Here are executive summaries and overviews for two of our initiatives.



✓ **The Financially Green Organization Certification Program™ Executive Summary & Overview**

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>

This thought provoking program is more than just a source educational financial information and advice. It is a complete personal financial management system – a clear step-by-step process designed to help organize the participant’s financial affairs and provides them with the essentials principles to smart personal financial management. The program provides the participants with the sustainable tools so they can better address financial challenges and advance toward achieving and maintaining their personal and family financial and philanthropic goals, while reducing debt and the stress that surrounds this area of life.

✓ **The Your financial PARTNER University / College Program™ Executive Summary & Overview**

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf>

University’s & colleges are in a strategic position to materially improve the lives of its students, alumni, faculty, administration and staff through a very special life-long learning gift and a life-long connection to the people that make up their Community. By providing the Community access to the *Your financial* PARTNER Program™ they will gain a better understanding of the essential principles to smart financial management and access to much needed personal financial management tools that will assist them thought out their lives in making better informed every day financial decisions; thus providing them the best possibilities to reach and maintain their personal financial dreams, freedom, security while advancing their philanthropy. Along with being recognized as a valuable benefit and resource for the participants and their families, this lifelong program will bring awareness the Community members for the need to get and keep their financial, estate and gift plans current, thus opening the door to help fund University / College projects and students and faculty through lifetime structured gifts, primary and alternate beneficiary selections, bequests and deferred gifts.

6. **Encourage your organization and associates to host** or take part in a ‘general public’ or a ‘professional’ webinar or community-wide workshop built around financial and estate planning during the months of April and October in support of improving financial awareness and financial literacy. Encourage your local

- Financial Planning Association Chapter
- Estate Planning Council
- National Association of Charitable Gift Planners
- Association of Fundraising Professionals Chapter
- International Association of Advisors in Philanthropy Chapter
- Society of Financial Service Professionals Chapter
- Nonprofits

and their financial service and nonprofit professionals to join in with these programs or do their own versions.

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. **Ask your State Governor and other political contacts to provide supporting proclamations** for Financial Literacy Month April and for Estate Planning Awareness Month in October. Semi-annually contact your state governor and request a supporting proclamation for



- **Financial Literacy Month (April) & 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

9. **Build and schedule your organization's annual marketing, branding, advertising, and social networks programs** around these amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your clients, members, and prospects.
10. **Contact us if you can volunteer some staff or executive time** to help on national and international efforts.
11. **Become an Ambassador / Volunteer / Strategic Partner with The Financial Awareness Foundation**  
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's a link that introduces this further and you can share with your employees and associates.  
<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>
12. **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>

Please join us and the leading financial and nonprofit associations, companies, and their professionals; nonprofits, educational institutions, larger employers, membership based organizations, technology companies, government agencies, and the news media on this important initiative. **Together we have the potential to help solve a major social challenge** by advancing and contributing to one of the most amazing, broad-based, multifaceted movement for improving financial awareness and financial literacy.



*“Learning, understanding, and using the essential principles to smart personal financial management are very important as it gives you the tools to address everyday financial decisions in a more informed manner.”*

*The Essential Principles of Smart Personal Financial Management™- the foundation to personal finance knowledge - is a collection of financial doctrines that pertain to the eleven components of personal financial management: paperwork, net worth, cash flow, employment benefits, goals, financial independence / retirement planning, major expenditures planning, investment planning, tax planning, insurance / risk management planning, and estate and gift planning.”*



# Calendar-Planner

The following is a scheduling tool designed to assist with the planning of your annual involvements with the improving financial awareness & financial literacy movement, campaigns, programs, & activities. Please feel free to edit it and adjust for your unique situation.

Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
<b>1. Placement of Financial &amp; Estate Planning Editorial Content in Support of NFLM &amp; NEPAW</b>													
<b>Public Financial Planning &amp; Estate Planning Content</b>													
1.	Appoint responsible person to manage the program		Xxxxxx	xxxxxx					xxxxxx	xxxxxx			
2.	Develop content for the public or contact us for materials		Xxxxxx	xxxxxx					xxxxxx	xxxxxx			
3.	Website												
4.	Newsletters												
5.	Social Media												
6.	News Media												
7.	Develop Annual Flyer												
8.	Developer Semiannual mailer												
9.													
10.													
11.	Present Content				Present Content						Present Content		
12.													
<b>Campaign Communications</b>													
1.	Appoint responsible person to manage the program		xxxxxx	xxxxxx					xxxxxx	xxxxxx			
2.	Develop content for the members & associates or contact us for materials		Xxxxxx	xxxxxx					Xxxxxx	xxxxxx			
3.	Members												
4.	Members & Associates												
5.	Develop Annual Flyer												
6.	Developer Semiannual mailer												
7.													
8.	Present Content				Present Content						Present Content		
9.													
<b>2. Add a Improving Financial Awareness &amp; Financial Literacy Page to your Website</b>													
1.	Add a Improving Financial Awareness & Financial Literacy Page to your website												
2.	Populate it with articles and links on												
3.	Financial Planning												
4.	Estate Planning												
5.	Gift planning												
6.	Life Planning												
7.	Legacy Planning												
8.													
9.	Add a blog												
10.													
11.	Contact for content and ideas												



Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
12.													
13.	Establish and update refresh schedule												
14.													
15.													
<b>3. Webinars &amp; Seminars</b>													
<b>Public Presentation</b>													
1.	Appoint responsible person to manage the program	Xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
2.	Develop presentation materials or contact us for materials	Xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Select Speakers		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
4.	Develop marketing materials		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
5.	Add to calendar		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
6.	Distribute marketing materials			Xxxxxx	xxxxxxxx					Xxxxxx	Xxxxxx		
7.	Presentation				Present Content						Present Content		
8.	Follow-up Survey				Xxxxxxxx						Xxxxxxxx		
9.													
10.													
11.													
12.													
13.													
14.													
15.													
<b>Professional Presentation</b>													
1.	Appoint responsible person to manage the program	Xxxxxx	xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
2.	Develop presentation materials or contact us for materials	Xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Select Speakers		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
4.	Decide if you are offering CE credits, if so get appropriate certifications or program approvals		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
5.	Develop marketing materials		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
6.	Distribute marketing materials			Xxxxxx	xxxxxxxx					Xxxxxx	Xxxxxx		
7.	Presentation				Present Content						Present Content		
8.	Follow-up Survey				xxxxxxx						Xxxxxxxx		
9.													
10.													
11.													
12.													
<b>4. Local Seminars &amp; Workshops</b>													
1.	Appoint responsible person to manage the program	Xxxxxx	xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
2.	Develop presentation materials or contact us for materials	xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Select Speakers		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
4.	Decide if you are offering CE credits, if so get appropriate certifications or program approvals		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
5.	Develop marketing materials		Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
6.	Distribute marketing materials			Xxxxxx	Xxxxxxxx					Xxxxxx	Xxxxxxxx		
7.													



Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
8.	Presentation				Present Content						Present Content		
9.	Follow-up Survey				Xxxxxxx						xxxxxxx		
<b>5. Circulate Press &amp; Industry Media Kits to Members</b>													
1.	Appoint responsible person to manage the task	Xxxxxx	Xxxxxx	xxxxxx				Xxxxxx	Xxxxx	Xxxxxx			
2.	Customize and edit Kit	Xxxxxx	Xxxxxx	xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
3.	Develop communication	xxxxxx	Xxxxxx	Xxxxxx				Xxxxxx	Xxxxxx	Xxxxxx			
4.	Send out and post communication		Xxxxxx	Xxxxxx					Xxxxxx	Xxxxxx			
5.													
6.													
7.													
8.													
9.													
<b>6. Ask Your State Governor and other Political Contacts for a Supporting Proclamation</b>													
1.	Semi-annually contact your state governor and request a supporting proclamation for												
	National Financial Literacy Month (April)		XXXXX	Xxxxxx	Xxxxxxxx								
	Estate Planning Awareness Month (October)								Xxxxx	xxxxxx	xxxxxxxxx		
	This is usually an online form that's easy to complete. Here's a link to a sample proclamation <a href="http://home.thefinancialawarenessfoundation.org/pdf/DraftImprovingFinancialAwareness-NFLM-NEPAW-Proclamation.pdf">http://home.thefinancialawarenessfoundation.org/pdf/DraftImprovingFinancialAwareness-NFLM-NEPAW-Proclamation.pdf</a>												
2.	Do the same with your Congressmen & women		Xxxxxx	Xxxxxx	Xxxxxxxx				Xxxxxx	xxxxxx	Xxxxxxx		
3.	Do the same with local Mayors & City Council Members		Xxxxxx	Xxxxxx	Xxxxxxxx				Xxxxxx	Xxxxxx	xxxxxxx		
4.													
5.													
<b>7. Current Program Integration</b>													
1.	<b>Annual Conference</b>												
2.													
3.	<b>Education Development</b>												
4.													
5.	<b>Publishing</b>												
6.													
7.	Videos												
8.													
9.	Leave a Legacy®												



Task		Jan	Feb	Mar	April	May	June	July	Aug	Sep	Oct	Nov	Dec
<b>8. Other Programs &amp; Activities</b>													
<b>Financially Green Organization Certification Programs™</b>													
1.	For Staff												
2.	For Members												
3.	For Other Organizations												
4.													
5.													
6.													
<b>Other Thoughts</b>													
1.	National Philanthropy Day												
2.	Videos												
3.	Publishing												
4.	Assist with a campaign to get all state governors to sign supporting proclamations for National Financial Literacy Month & National Estate Planning Awareness Week												
5.	Contest for the best Financial Awareness 1. Community Activity 2. Checklist 3. Article 4. Campaign Slogan 5. Campaign Flyer 6. Website 7. Other possibilities?												
6.	Challenge who has the most financially literate 1. Chapter / Council 2. Employees 3. Members 4. City 5. State 6. University												
7.	Joint Research Projects & White Papers												
8.	Joint Fundraising Campaigns												
9.													
10.													
11.													
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21.													







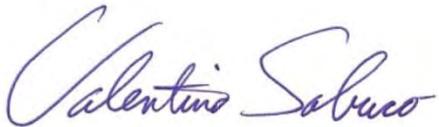
## We Welcome Your Assistance and Support

To learn more about us and the improving financial awareness & financial literacy movement, campaigns, programs and efforts, and 'how you can make a meaningful difference' visit us at [www.TheFinancialAwarenessFoundation.org](http://www.TheFinancialAwarenessFoundation.org) and join our discussion group on [LinkedIn](#).

If you have further ideas or require additional information about us and the financial awareness movement, campaigns, programs and activities, or to discuss volunteer activities, sponsorships, planned gifts, and contributions and grants to The Financial Awareness Foundation, please contact me directly.

Thank you for your consideration and we look forward to hearing from you.

Respectfully submitted,



**Valentino Sabuco**, Executive Director

**The Financial Awareness Foundation**

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

*"Improving financial awareness & financial literacy..."* <sup>SM</sup>

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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!***



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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, or [v.sabuco@TheFinancialAwarenessFoundation.org](mailto:v.sabuco@TheFinancialAwarenessFoundation.org).

## 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.

So many people are on the verge of running out of money prematurely. Many families are burdened with large amounts of student loans and other forms of debt. More than half of our adults in America (120 million – poor to wealthy) do not have nor understand the importance of having an up-to-date estate, financial and gift plans to protect themselves and their families. **We have a serious problem.** This lack of financial awareness, along with the **financial illiteracy epidemic** 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. This is not just a US epidemic it's an international

To help solve this major social challenge, The Foundation serves as a nonpolitical "financial awareness advocate" for the general public, the financial service and nonprofit professionals and their organizations, educational institutions, municipalities, and employers.

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

- Make better informed and productive everyday money decisions
- Save time and money with their financial advisors and service providers
- Have the best opportunities to reach and maintain their personal / family financial dreams
- Enjoy a financially secure debt free future
- Advance their legacy.

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 that are championing improving financial awareness and financial literacy. We are then uniting them with other associations, organizations, nonprofits, educational institutions, municipalities, and employers to actively focus their vast community resources into **The Improving Financial Awareness & Financial Literacy Movement & Campaigns** - a growing concentrated personal finance content media blitz campaign every six months through the strategic campaign venues of
  - **Estate & Gift Planning Awareness Month** – 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 **National Estate & Gift Planning Awareness Month**

<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>



- **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. 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 **National Financial Literacy Month**.

<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>

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

2. The Foundation 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 planning and charitable planning needs.

### TFAF Complimentary Set of Personal Finance Publications

**Here is a link to download TFAF 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>



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 financial 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 money management and a comprehensive set of common financial mistakes to avoid. These tools empower you to make better informed everyday money decisions so they can
  - Live a quality life without outliving their wealth
  - Watch personal / family dreams become a reality
  - Make decisions about their lifestyle without financial worry
  - Enjoy a financially secure debt-free future
  - Work with financial professionals and product providers to get the best results from their time and 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.

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



**You are not required to financially support The Financial Awareness Foundation in any way or have to pay a marketing or membership fee or make a contribution in order to participate in these important improving financial awareness movement or programs. But as a 501(c)(3) nonprofit your support and contributions are always welcomed and very much appreciated.**

**To learn more about The Financial Awareness Foundation, the Improving Financial Awareness Movement, Campaigns, & Programs**

Visit our website at <http://www.TheFinancialAwarenessFoundation.org>

**Becoming a TFAF-Ambassador-Volunteer-Overview**

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>





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

*Improving Financial Awareness & Financial Literacy™*

## Donor Contribution Form

### Have You Ever Heard Someone Say...

*“Doesn't the government provide for that?”* *“Estate and financial planning is too complicated and expensive.”*

*“All my property is titled in joint tenancy with my spouse so I don't need a will.”*

*“Estate and financial planning is only for the rich.”*

*“I'm too young to do estate or financial planning.”*

The Financial Awareness Foundation is a 501(c)(3) nonprofit organization. We serve as a nonpolitical “financial awareness advocate” for the general public, the financial service, nonprofit, and educational professionals and their organizations, municipalities, and employers.

Our mission is to significantly help solve a major social problem dealing with the lack of financial awareness and financial literacy. We believe that teaching financial awareness, financial literacy and the essential principles to smart personal financial management are very important as this gives people the tools of empowerment to:

- Make better informed and productive everyday money decisions
- Save time and money with their financial advisors and service providers
- Have the best opportunities to reach and maintain their personal / family financial dreams
- Enjoy a financially secure debt free future
- Advance their philanthropy and legacy plans.

### **WE CAN'T DO THIS ALONE – WE NEED YOUR HELP!**

Please consider making a ‘Tax-deductible Contribution’ to The Financial Awareness Foundation by completing and returning this page. Thank you for your consideration.

To learn more about us, link to [www.TheFinancialAwarenessFoundation.org](http://www.TheFinancialAwarenessFoundation.org)

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# The Roadmap to Significantly Improving Financial Awareness & Financial Literacy

Please join in and support and actively participate. Together we have the potential to help solve a major social challenge by advancing and contributing to one of the most amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy.



**The FINANCIAL AWARENESS Foundation**

*"Your financial PARTNER"™*

dedicated to significantly

"Improving financial awareness & financial literacy"™

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