

# Implementation Planning Toolkit for YOUR

## The Improving Financial Awareness & Financial Literacy Movement

Following are links to a collection to Guides and Planners to assist you and your team in planning, developing, implementing, and managing The Movement in your Country, Municipality, University, Community or Organization. As every situation is unique please use these materials as a model and feel free to innovate as you see appropriate for your situation. Should you have any suggestions or questions please do not hesitate to reach out to us for further input or suggestions or to discuss the matter further.

**Cautious: Improving financial awareness and financial literacy can be contagious.**



### Guidebooks & Planners – for The Movement



#### **The Improving Financial Awareness & Financial Literacy Movement - Implementation Plan Guidebook (57 Pages)**

This is a comprehensive tool for municipalities, major stakeholders, universities, team leaders, strategic partners and major volunteer groups to master plan The Movement in your Country, Municipality, University, Company or Organization.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-ImplementationPlanGuidebook.pdf>



#### **The Movement –Team Leaders Your Implementation Planner (69 Pages)**

Team leaders a comprehensive tool to help organize, implement and manage your efforts.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-YourImplementationPlan.pdf>



#### **Program Overview / Planner (30 Pages)**

This provides an overview of **The Movement** and some great planning tools.

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>



#### **Draft - Soft Launch Implementation Plans for The Improving Financial Awareness & Financial Literacy Movement With its semi-annual personal finance content media blitz around the strategic campaign venues April – Financial Literacy Month & October – Estate & Gift Planning Awareness Month (11 Pages)**

This document outlines the initial steps suggested to soft launch The Movement in for Country with the University and it's The International Improving Financial Awareness and Financial Literacy Research Center taking on the role of lead entity for launching and managing The Movement in the country and University.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-SoftLaunch.pdf>



### **The FINANCIAL AWARENESS Foundation**

A 501(c)(3) Nonprofit Organization Dedicated to Significantly  
**Improving Financial Awareness & Financial Literacy...**<sup>TM</sup>

959 Golf Course Drive, #273 ♦ Rohnert Park ♦ Sonoma County ♦ CA 94928 - (version 083120)

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# The Improving Financial Awareness & Financial Literacy Movement



## Introduction Video to The Movement & The Foundation

**Note Slides**

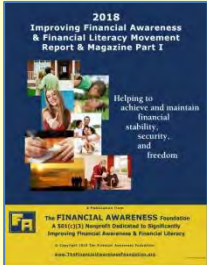
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TheMovementIntro-NotesTaking.pdf>

**Slide Deck**

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

**Link to Video**

<https://youtu.be/vJnupjmg6Ps>



## The Improving Financial Awareness & Financial Literacy Movement Report & Magazine (284 Pages)

This report provides a sampling of the community participation, including supporting proclamations from many 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 what they are doing and so much more.

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



## How Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line (11 Pages)

For CPAs, Attorneys, CFPs, Wealth Managers, Insurance Agents, Trust Officers, Realtor and other 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>



## For The People - The General Public - Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All (4 Pages)

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



## Background on The Movement & Sample Proclamations for Political Leaders (16 Pages)

This provides you the materials to secure a Proclamation from your elected officials to support The Movement In Support of Improving Financial Awareness & Financial Literacy Movement for

- April is Financial Literacy Month in (State, Country, City)
- October is Estate & Gift Planning Awareness Month in (State, Country, City)

<http://home.thefinancialawarenessfoundation.org/pdf/DraftImprovingFinancialAwareness-NFLM-NEPAW-Proclamation.pdf>



## TFAF- Key Financial Literacy Definitions (7 Pages)

This includes a collection of our definitions to key financial awareness and financial literacy terms. You can also find a complete glossary of personal finance terms in our complimentary TFAF Personal Finance Publication Set.

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



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## The Financially Green Organization Certification Program™ Executive Summary & Overview

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.



The workshop link below let you see all the downloads of presentation materials as well as videos of

- **Building Blocks to Successful Financial Planning**
- **Building Blocks to Successful Estate & Gift Planning**

If you click on the October 2017 tab you can actually see a set of all the presentation materials including a recording of the materials that was circulated on their cable TV network along with our complimentary TFAF- Personal Finance Publication Set. We have built a local speakers bureau of over 30 financial service professionals that have now served as presenters and moderators for these presentations. These presentations are updated annually. They can be condensed and expanded as appropriate with the time available and kind of audience.

**What do you think about encouraging your community and other communities you touch to do something like this?**

**Program Executive Summary / Overview Sample Flyer Links to videos and materials**

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

[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>



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

Universities and Colleges are in a strategic position to materially improve the lives of its students, alumni, faculty and administrative personnel, and supporters. This happens through their current education programs and through a new addition to life-long learning and a life-long connection to the people that make up their community.

By providing graduating students, faculty and administrative personnel, alumni, and supporters (The Community) access to the Your financialPARTNER University / College Program™ you are building a lifelong bond and social media connection while giving your community the secrets of smart money and essential principles to smart money management - the foundation to personal finance knowledge. This is an excellent life-long learning program for graduating students, faculty and staff, and alumni while helping with development efforts at schools you touch.

These have been piloted 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 which launched the first Improving Financial Awareness & Financial Literacy Student Club.

We've established the first **The International Improving Financial Awareness & Financial Literacy Research Center at Makerere University in Uganda**. They are the largest university in Uganda with a student enrollment of over 39,000. We plan to link this with other campuses around the world.

**Wouldn't it be great to introduce this as a gift program for graduating students, faculty and staff, and alumni at universities and colleges you touch, following on with semi-annual updates during each April and October?**

**Program Executive Summary / Overview See What USC is doing**

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

<https://emeriti.usc.edu/resources/financial-literacy/>





## Additional Complimentary Resources

This is a collection links to documents, publications, articles, videos, guides, checklist and other tools to assist you and your colleagues in actively participating in The Improving Financial Awareness & Financial Literacy Movement.

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



# The Improving Financial Awareness & Financial Literacy Movement in Africa

## The Movement in Africa

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Africa-TIFA-FLM.pdf>

### East Africa

**The Movement in Kenya** 50 million people

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Kenya-ExecSum.pdf>

**The Movement in Uganda** 40 million people

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Uganda-ExecSum.pdf>

**The Movement in Tanzania** 57 million people

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Tanzania-ExecSum.pdf>

## How to Change the World with Better Financial Awareness & Financial Literacy

This international article was written by Michael Ochieng Nyawino Executive Director of COHECF-KENYA, Lead TFAF Ambassador from Kenya

<https://www.urbanet.info/how-to-change-the-world-with-better-financial-awareness/>

### West Africa

**The Movement in Ghana** 30 million people

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Ghana-ExecSum.pdf>

## A Recapitalized Banking Sector a New Breeze for Value Creation (See Chapter 6 – Page 78)

Co-authored by Dr. Benjamin Amoah and Dr. Anthony Amoah, (CUUFIS)

<http://www.thefinancialawarenessfoundation.org/pdf/2019-CentralUniv-ARecapBankSector-GhanaReport.pdf>

Other Countries we are in discussions with regarding establishing The Movement, University & College Improving Financial Awareness & Financial Literacy Programs and The International Improving Financial Awareness & Financial Literacy Research Centers within include

Brazil 209 Million People

Brazil – English

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Brazil-ExecSum.pdf>

Brazil – Portuguese

<http://www.thefinancialawarenessfoundation.org/pdf/OMovimentoMelhorandoaConscienciaFinanceiraeaAlfabetizacaofinanceiranoBrasil.pdf>

Cameroon 24 Million People

China 1.5 Billion People

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-China-ExecSum.pdf>

India 1.4 Billion People

Macedonia 2 Million People

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Macedonia-ExecSum.pdf>

Vietnam 95 Million People

As you may know in many parts of the world financial literacy deals only with savings, budgeting and debt management and many have never heard or thought about comprehensive financial planning which also includes: helping people get and stay organized, establishing personal and financial goals, retirement planning, planning for major expenditures, investment planning, tax planning, risk management planning, and estate, gift and charitable planning.

We wonder what the global societal and economic impact on the world's markets will be if we can significantly increase the quality of life and buying power of THE PEOPLE around the world through ***The International Improving Financial Awareness & Financial Literacy Movement***.

**We believe this will go a long way towards solving many of the world's current social challenges while benefiting 'The Entire Community' by having happier and financially successful constituents, creating jobs and helping to build a robust economy, while reducing poverty, crime, and the strain on social welfare services.**



# About - The Financial Awareness Foundation



The Financial Awareness Foundation, a 501(c)(3) nonprofit, is on a mission to significantly help solve a major social problem dealing with the lack of financial awareness and financial literacy. The Foundation has taken a leadership role in **The Improving Financial Awareness & Financial Literacy Movement**, with its semi-annually concentrated personal finance content media blitz through the strategic campaign venues of

- **Financial Literacy Month** (April) and
- **Estate & Gift Planning Awareness Month** (October).

The goal is to touch and encourage everyone at least twice a year to get and keep their financial house in order with current financial, estate & gift plans



## Website

[www.thefinancialawarenessfoundation.org](http://www.thefinancialawarenessfoundation.org)



**TFAF Brochure** (4 Pages)

<http://www.thefinancialawarenessfoundation.org/pdf/TheFinancialAwarenessFoundationBrochure.pdf>



**TFAF- Fact Sheet** (2 pages)

<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationFactSheet.pdf>



**The Financial Awareness Foundation Introduction** – 19 pages

<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf>



**IRS Determination Letter** (1 Page)

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf>



**Serving as a TFAF Ambassador, Strategic Partner or Volunteer Overview & Application** (15 Pages)

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



**TFAF Annual Report** (54 Pages)

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-FoundationReport&BusPlan.pdf>



## The FINANCIAL AWARENESS Foundation



## Donate Now Help us do more with a generous Contribution –

Via mail  
Via our  
secured  
website

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

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



### TFAF Gift Acceptance Policy

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-GiftAcceptancePolicy.pdf>



**Valentino Sabuco Executive Director** for The Financial Awareness Foundation that has helped pioneer the 'fee-only' the personal and business financial planning profession over the last 40 years as a principle of CPA firms and through his private practice, syndicated columns, books and publishing and nonprofit activities.

**Backgrounder** <http://home.thefinancialawarenessfoundation.org/pdf/Sabuco-TFAF-Intro.pdf>

Organizations and individuals are never required to financially support **The Financial Awareness Foundation** in any way. They do not pay any marketing or membership fee, or make a contribution in order to participate in the important improving financial awareness and financial literacy movement, campaigns and programs. And we develop and distribute high quality materials at 'NO Cost'. But as a 501(c)(3) nonprofit organization, financial support and contributions are always welcomed and very much appreciated.



Please let us know if you would like any additional information and if we can assist you in any way.

Wishing you all the very best,

**Valentino Sabuco**, Executive Director

### The Financial Awareness Foundation

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"Improving financial awareness & financial literacy..."

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



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