



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

*Improving Financial Awareness & Financial Literacy™*

## Introduction Factsheet

### Background & Mission

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.

The Foundation serves as a nonpolitical “financial awareness advocate” for the 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 everyday money decisions so they can
  - ◆ Live a better quality of life without outliving their wealth
  - ◆ Watch personal / family dreams become a reality
  - ◆ Make decisions about 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

We are 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, employers, and news media to actively focus their vast community resources into **The Improving Financial Awareness & Financial Literacy Movement** with its concentrated personal finance content media blitz every six months through the strategic campaign venues of

- **Financial Literacy Month** (April) and 6 months later during
- **Estate & Gift Planning Awareness Month** (October)

The plan is to touch the majority of the general public, financial service and nonprofit professionals and their organizations at least twice a year through these strategic venues, with educational and motivating reminders to get and keep their financial, estate and gift plans in order.

### The 2018 Improving Financial Awareness & Financial Literacy Movement

Distinguished Co-Honorary Chairs are

- **Representing Academia, Janette Brown, Ed.D., Assistant Vice Provost, USC Emeriti Center**
- **Representing Financial & Legal Services, Martin M. Shenkman, JD, CPA, PFS, AEP-Distinguished**
- **Representing News Media, Randy A. Fox, Editor in Chief of Planned Giving Design Center**
- **Representing Nonprofit / Charitable Gift Planning Community, Michael Kenyon, President & CEO of the National Association of Charitable Gift Planners**

To see what's being accomplished review our semi-annual **Improving Financial Awareness & Financial Literacy Movement Report & Magazine™**

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

Further The Foundation delivers & develops exceptional educational content for the general public, financial service & nonprofit professionals, & educational institutions that support the public's financial-estate & gift planning-charitable planning needs.

### Board - Leadership

#### **Valentino Sabuco, Executive Director**

Executive Director & Publisher of The Financial Awareness Foundation

[www.thefinancialawarenessfoundation.org/pdf/Sabuco-TFAF-Intro.pdf](http://www.thefinancialawarenessfoundation.org/pdf/Sabuco-TFAF-Intro.pdf)

#### **Pierce H. McDowell III, JD, Director**

Co-Founder, Co-Chairman and Co-Chief Executive Officer of South Dakota Trust Company, LLC

[www.sdplanco.com/Planning-Information/Management-Biographies.aspx](http://www.sdplanco.com/Planning-Information/Management-Biographies.aspx)

#### **Ken Ruff, Director**

Interim CTO, Retired businessman, Technologist & Digital Media Developer

#### **Adam Strominger, Director**

Planned Giving Director at Food for The Poor- the largest international relief agency in the United States

[www.thefinancialawarenessfoundation.org/pdf/Strominger-TFAF-Board.pdf](http://www.thefinancialawarenessfoundation.org/pdf/Strominger-TFAF-Board.pdf)

#### **Paul G. Schervish, M.Div., Ph.D., Director Emeritus**

Professor of Sociology and Director of the Center on Wealth and Philanthropy (CWP) at Boston College

[www.thefinancialawarenessfoundation.org/pdf/7-3-HonoraryCoChairSchervish.pdf](http://www.thefinancialawarenessfoundation.org/pdf/7-3-HonoraryCoChairSchervish.pdf)





### The Financial Awareness Foundation key link directory

1. The Financial Awareness Foundation website and 1 minute video  
[www.TheFinancialAwarenessFoundation.org](http://www.TheFinancialAwarenessFoundation.org)
2. Our Board  
<http://home.thefinancialawarenessfoundation.org/board.html>
3. IRS Determination Letter  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf>
4. For Philanthropists & Strategic Partners – Introduction  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TheFinancialAwarenessFoundation-Intro.pdf>
5. For the General Public – About Us  
[http://www.thefinancialawarenessfoundation.org/pdf/About\\_TFAF.pdf](http://www.thefinancialawarenessfoundation.org/pdf/About_TFAF.pdf)
6. The Financial Awareness Foundation Introduction  
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf>
7. The Financial Awareness Foundation Brochure  
<http://www.thefinancialawarenessfoundation.org/pdf/TheFinancialAwarenessFoundationBrochure.pdf>
8. The Financial Awareness Foundation Annual Report & Business Plan  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FoundationReport&BusPlan.pdf>
9. The Improving Financial Awareness & Financial Literacy Movement & Campaign Materials
  - ◆ The Improving Financial Awareness & Financial Literacy Movement Report & Magazine™  
Spring <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-SpringCampaignReport&Magazine.pdf>  
Fall <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
  - ◆ Press & Industry Media Kit  
<http://home.thefinancialawarenessfoundation.org/campaigns.html#TFAF-Improving>
  - ◆ The Improving Financial Awareness & Financial Literacy Movement Program Overview / Planner  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>
  - ◆ 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>
  - ◆ For the general public - Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-PublicSupportfortheImprovingFinancialAwareness.pdf>
10. TFAF Complimentary - The Personal Finance Publication Set  
<http://home.thefinancialawarenessfoundation.org/publications.html>
11. TFAF Sample Webinar & Community Presentations
  - ◆ *Building Blocks To Successful Financial Planning* - City of Monterey and its Public Library  
<http://www.monterey.org/library/Events/Financial-Awareness-Workshops>
12. TFAF Improving Financial Awareness & Financial Literacy Programs
  - ◆ The Financially Green Organization Certification Program™ Overview  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>
  - ◆ The Your financial PARTNER University Program™ Overview  
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUUniversityProgramOverview.pdf>
13. TFAF – White Papers
  - ◆ *We Have a Lack of Financial Awareness & Financial Illiteracy Epidemic that Requires Immediate Attention*  
<http://home.thefinancialawarenessfoundation.org/publications.html>

For additional information about us and **The Improving Financial Awareness & Financial Literacy 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

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**The FINANCIAL AWARENESS Foundation**

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