



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

Improving Financial Awareness & Financial Literacy™

To: Interested Parties
From: Valentino Sabuco, CFP®, AEP®, Executive Director & Publisher
Date: July 2017
Re: **Introduction to The Financial Awareness Foundation**

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 illiteracy.

The Foundation serves as a nonpolitical “financial awareness advocate” for the general public, the financial service and nonprofits professionals and their organizations, educational institutions, municipalities, and employers.



(Click on the play button to see our one minute video)

Mission: 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.

With so many people on the verge of running out of money before their life expectancy and over half your friends and neighbors not having an up-to-date estate 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 ultimate safety net – the state and federal government. This is not just a domestic challenge it is an international one. We feel the solution to these financial challenges revolves around better financial education.

Purpose: The Foundation serves to benefit you by significantly improving financial awareness and financial literacy.

Vision: The Foundation envisions a world where every person has access to the right financial advice and the skills and tools to manage their finances so they can achieve and maintain their financial stability, security, and freedom throughout their lives, while advancing their personal philanthropy. We see this happening by significantly improving both the public’s financial awareness and their financial literacy, while developing & assembling educational content to assist financial service and nonprofit professionals in providing high-quality, cost-effective services to the general public..

Core Values:

1. **Public Service** – Serve as a nonpolitical “financial awareness advocate” to the general public providing them with the essentials principles of smart personal financial management so they can make better every day financial decisions throughout their lives.
2. **Knowledge** – Encourage and support financial education to improve financial awareness and financial literacy.
3. **Collaboration** – Recognize, promote, and unite organizations that are championing improving financial awareness and financial literacy with other organizations, nonprofits, educational institutions, municipalities, and employers, and individuals.
4. **Diversity** – Promote cultural diversity within the financial services professions to better serve a diversified public.
5. **Ethics** – Encourage ethical behavior within financial service professions, nonprofits, and the business world.

Focus: The Financial Awareness Foundation has two main focal points that 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 venues of



- **National Financial Literacy Month (April)**
<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>
- **National Estate Planning Awareness Week (3rd week in October)** (We worked with Congressman Thompson’s Office during 2007 and 2008 to help create this proclamation that was signed by 50 bi-partisan Congresswomen and Congressmen, and have helped to advance and promote it since.)
<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>

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 venues, with educational and motivating reminders to **get and keep their financial, estate, and gift plans in order**.

We understand that this is a massive undertaking; but as we move into the 9th year of the **Improving Financial Awareness & Financial Literacy Movement** it’s being accomplished through thought leading financial service and nonprofit organizations and their professionals, educational institutions, municipalities, employers, the news media, and other concerned organizations and individuals.



You can see our advancements and what others are doing from the **Improving Financial Awareness & Financial Literacy Movement Report & Magazine™**. This provides a broad picture of the lack of financial awareness and financial illiteracy epidemic, an overview of the strategy behind the movement and campaigns, and a sampling of the community participation, including

- Supporting Presidential and 23 Governor's Proclamations (starting on page 38),
- Evaluation Services fall campaign launching webinar (page 75),
- AFP's (Association of Fund Raising Professionals) said to its 35,000 members (page 77),
- Purposeful Planning Institute - said to their community (page 80),
- Trust & Estates - (page 82),
- Planned Giving Design Center - (page 85),
- American Academy of Attorney-CPA's (page 92),
- HeirSearch.com estate planning video (page 97),
- The American College (page 168),
- PBS "Are Your Ducks In A Row? Award winning campaign (page 175-180),
- Expanded Educational Initiatives (page 215),
- International Section (page 227),
- and so much more.

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

2. The Foundation also delivers and develops exceptional educational content and programs 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.

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

Organizations are not required to financially support The Financial Awareness Foundation in any way. They do not 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. And we distribute high quality materials at 'NO Cost'. But as a 501(c)(3) nonprofit financial support and contributions are always welcomed and very much appreciated.



The Financial Awareness Foundation Leadership and Board of Directors:



Valentino Sabuco, CFP[®], AEP[®], Executive Director & Publisher
Executive Director & Publisher of The Financial Awareness Foundation
Sonoma County, California
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 and the South Dakota Planning Company, LLC
www.sdplanco.com/Planning-Information/Management-Biographies.aspx



Ken Ruff, Director
Interim CTO, Retired businessman, Technologist & Digital Media Developer
Sonoma County, California



Amar Sawhney, CFP[®], Director
Professor of Architecture, School of Architecture, Miami Dade College,
www.thefinancialawarenessfoundation.org/pdf/Sawhney-TFAF-Board.pdf



Paul G. Schervish, M.Div., Ph.D., Founding 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



Adam Strominger, Director
Planned Giving Director at Food for The Poor- the largest international relief agency in the United States
Coconut Creek, Florida
www.thefinancialawarenessfoundation.org/pdf/Strominger-TFAF-Board.pdf



What Others Are Saying About The Financial Awareness Foundation

Our Publications

"I would highly recommend Your financial PARTNER as an excellent tool for financial advisors and estate planners for use with their clients, as well as for consumers to use it with their with their families and financial advisors."

-Sidney Kess, Esq., CPA, J.D., LL.M., AEP®, Distinguished

"I found the Financial Partner to provide a full range of the core essentials of sound money management and is written at a level that anyone who can balance a checkbook can understand."

Robert Eyler, Ph.D., Chair Department of Economics Sonoma State University

Some of our Strategic Partners

- **American Academy of Attorney-CPAs**
<http://www.multibriefs.com/briefs/aaacpa/AAACPA040517.php>
- **AFP – Association of Fundraising Professionals**
<http://www.afpnet.org/Audiences/MemberNewsDetail.cfm?ItemNumber=37253>
- **National Association of Charitable Gift Planners**
<https://charitablegiftplanners.org/news/april-financial-awareness-month>

<http://blog.charitablegiftplanners.org/checklist-six-steps-toward-successful-estate-planning>
- **Purposeful Planning Institute**
<https://purposefulplanninginstitute.com/supporting-improving-financial-awareness-financial-literacy/>
- **Monterey Public Library**
<http://www.monterey.org/library/Events/Financial-Awareness-Workshops>
- **University of Miami School of Law**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-MiamiLaw-BuildingBlockstoSuccessfulFP-033117.pdf>

Governor's Supporting Improving Financial Awareness & Financial Literacy Movement Campaigns

We've begun a governor proclamation campaign with a goal to have each state governor sign supporting proclamations each year for **Financial Literacy Month** (April) and **Estate Planning Awareness Month** (October) like the 23 Governors that signed supporting proclamations in 2016; those highlighted in yellow signed one for both.

1. Governor Mike Beebe, Arkansas
2. Governor Jerry Brown - California
3. Governor John Hickenlooper, Colorado
4. **Jack Markell, Delaware**
5. Rick Scott, Florida
6. Nathan Deal, Georgia
7. **Butch Otter, Idaho**
8. Terry Branstad, Iowa
9. Sam Brownback of Kansas
10. Governor Matt Bevin, Kentucky
11. Governor Rick Snyder, Michigan
12. Mark Dayton of Minnesota
13. Phil Bryant of Mississippi
14. Margret Wood Hassan of New Hampshire
15. Governor Pat McCrory of North Carolina
16. **Mary Fallin, Oklahoma**
17. Governor Tom Wolf, Pennsylvania
18. **Dennis Daugaard, South Dakota**
19. Bill Haslam of Tennessee
20. **Governor Greg Abbott, Texas**
21. Peter Shumlin of Vermont
22. **Terry McAuliffe of Virginia**
23. Scott Walker of Wisconsin

You can see the actual proclamation in our Fall Issue of the **Improving Financial Awareness & Financial Literacy Campaign Report & Magazine™**

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



We have a VERY BIG social challenge that requires immediate attention

With so many people on the path to or verge of running out of money before their life expectancy, many families burdened with large amounts of student loans and other forms of debt, and more than half of our adults (120 million-poor to wealthy) not having up-to-date estate and financial plans to protect themselves and their families, **we have a serious problem**. This lack of financial awareness and 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.

Do you realize?

- **The majority of the adults in the US that reach the age of 70 are almost out of money**, but have life expectancies well into their mid-80's and maybe into their 90's. That's disastrous. Who will be responsible for them? The choices are few, family and friends, employers, nonprofits and people with money, and the government as a final safety net.
- Too many young people and their families are burdened with excessive education debt and other forms of debt. Student loan debt exceeds \$1.3 trillion and is **the 2nd largest class of consumer debt after mortgages; members of the class of 2016 graduated with an AVERAGE of \$37,000 in student loan debt. Those with graduate degrees are significantly greater.**
- **Over 120 million adults**, 50% of our adult population (that could be half your family and friends and business associates) don't have a current estate plan to protect themselves and their assets in the event of sickness or when they pass away. This is a real problem, as most feel they don't have an estate to plan for; this is **NOT TRUE**. Estate planning is not just for the wealthy or elderly; it's important for everyone. With some advance planning, issues such as managing bill paying and assets in the event of sickness or disability, guardianship of children, care of a special needs child and long-term care needs, and distribution of retirement plan and other assets to the correct person(s) and nonprofit(s) at ones death can all be handled with sensitivity, care, and at a reasonable cost.
- The Consumer Financial Protection Bureau released a report in January that examined the link between financial education and financial well-being. A key finding was that while many adults desire to educate themselves to become more financially literate, they often seek out that information only within their social networks. This cuts across all demographics, including education level and income. **This is quite alarming**: People are making critical life decisions based on information gained from non-experts and fragmented sources.
- **We have entered into the greatest wealth transfer in history**. An estimated \$59 trillion - divided among heirs, charities, estate taxes and estate closing costs - will be transferred from 116 million American households from 2007 to 2061 as reported by John J. Havens and Paul G. Schervish from the Center on Wealth and Philanthropy Boston College.
- **Without some financial and estate planning a significant amount of these assets will be wasted**; much of the remaining assets may not go to the right person(s) or organization(s), and or may not be used as intended.
- However, this huge wealth transfer is not for all families, many will run out of money long before passing.
- **This is not just a domestic challenge it is an international one.**

Managing personal finances today is more complicated and more important than ever. We're living longer, but saving proportionately less. Scores of us feel less secure in our jobs and homes than we did in the past. We see our money being drained by the high cost of housing, taxes, education, health care, while dealing with the uncertainty of investments and our economy. We worry about the future, or unfortunately in many cases, simply try not to think about it.

Most people are not taught the essential principle to smart personal financial management at home or in school, thus they don't have the proper tools to address every day financial decisions in an informed manner. This jeopardizes their financial and physical wellness, their ability to realistically achieve and maintain their personal and financial dreams, let alone enjoy a financially secure debt free future.



The Solution / Master Plan / How Everyone Benefits

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

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

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

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

The Strategy

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

- **National Financial Literacy Month** – In 2004 the Senate passed Resolution 316 that officially recognized April as National Financial Literacy Month. In 2016 President Obama signed a Presidential Proclamation proclaiming April as National Financial Capability Month. www.TheFinancialAwarenessFoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf
- **National Estate Planning Awareness Month/Week** – In 2007 founders of The Financial Awareness Foundation approached Congressman's Mike Thompson office with the idea of creating a National Estate Planning Awareness Week Congressional proclamation. After eighteen months of research and work he and 49 bipartisan congressmen and congresswomen co-authored and passed H.Res. 1499, which proclaims the third week in October as National Estate Planning Awareness Week. www.TheFinancialAwarenessFoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf



The plan is to touch the majority of the general public, high net worth individuals, 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 objective is to encourage financial / nonprofit / education professionals and their organizations, 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; 120 million America's-half the adults; rich to poor - that don't have plans.

We encourage you to join us and other financial service and nonprofit organizations and professional associations such as: the American Institute of Certified Public Accountants, the Society of Attorney-Certified Public Accountants, the American Bar Association Section of Real Property, Trust and Estate Law; the Association of Fundraising Professionals, the Society of Financial Service Professionals, the National Academy of Elder Law Attorneys, National Association of Estate Planners and Councils, the National Association of Charitable Gift Planners, the Financial Planning Association®, and The International Association of Advisors in Philanthropy that have supported National Financial Literacy Month and National Estate Planning Awareness Month/Week.

We understand that this is a massive undertaking but it's being accomplished through leading organizations and their associates that include:

- Financial service associations and their members
- Nonprofit associations and their members
- Financial service professionals and their companies
- Nonprofits / Employers / Technology companies
- Educational institutions
- Government entities
- News media

Together these organizations represent nearly 1,000,000 financial professionals. The accountants, attorneys, estate planners, financial planners and advisors, insurance agents and brokers, trust officers, and nonprofit executive directors and development officers that are members of these organizations are helping to mobilize the financial and estate planning and nonprofit communities by providing support, tools, and education for their professionals and the general public they serve.



This is supplemented throughout the year with the develop and delivery of exceptional educational content, programs and tools to the general public and to financial service and nonprofit professionals and their organizations, and educational institutions that support the general public's financial and estate planning and charitable planning needs.

You can see our advancements and what others are doing within the latest **Improving Financial Awareness & Financial Literacy Campaign Report & Magazine™** found at

- **Fall** www.TheFinancialAwarenessFoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf
- **Spring** www.TheFinancialAwarenessFoundation.org/pdf/TFAF-SpringCampaignReport&Magazine.pdf



How Everyone Benefits

What a great opportunity for you to create goodwill and new revenue opportunities while performing a very important and values community service.

- You benefit by being recognized as a thought leader that is significantly helping to solve a major social problem. This will create goodwill for you and your organization that will attract new patrons, retain existing ones, and build support for your own other initiatives.
- You, your staff, patrons, and prospects benefit by receiving personal financial and estate planning materials to improve their personal financial position and receive a powerful campaign and program to use within your organization to generate new sources of revenues.
- Families benefit by learning the essential principles to smart financial management so they can empower themselves to make better, informed and 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 personal philanthropy and 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 benefits by helping to solve a major social problem that leads to a better world.
- The news media benefits by providing its audience with timely valuable information.
- Municipalities benefit by having happier and financially successful constituents, and a reduced strain on social welfare services.
- Everyone actually benefits with a stronger and financially sound economy.

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

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

Please join the **2017 Distinguished Co-Honorary Chairs for the Improving Financial Awareness & Financial Awareness Movement**



Representing Academia Thought Leadership

Patricia D. White, JD, Dean of the University of Miami School of Law. Her legal career spans four decades as an attorney and an educator. Dean White is transformative and a visionary; and the National Jurist Magazine named her as one of the most influential people in legal education in 2015, 2014, and in 2013.



Representing Financial and Legal Services Thought Leadership

John A. Warnick, JD, CEO & Founder of the Purposeful Planning Institute. Along with his duties as the CEO of PPI, John A. is a practicing estate planning attorney who balances his enthusiasm for tax savings with in-depth discovery and purposeful questions to ensure the planning is congruent with his client's core values. John A. delivers workshops across the country for estate planning attorneys and financial planners sharing the six paradigms of Purposeful Planning and the Seven Keys of Purposeful Trust and Gifts. Received his BA magna cum laude from Brigham Young University and his JD from George Washington

University with honors, and has authored two BNA (Bureau of National Affairs) Tax Management portfolios and many other professional articles.



Representing News Media Thought Leadership

Randy A. Fox, Editor in Chief of Planned Giving Design Center a national website and newsletter for philanthropic advisors. Randy's exceptional ability to make the most complex and technical materials clear and relevant has given him the opportunity to have been a regular contributor to numerous publications. Randy also co-founded and is an active principle of Life Legacy Case Design, a back office for professional advisors engaged with high net worth families, and EzCharitable, an online philanthropic giving training resource for professionals.

He's past president Board of the International Association of Advisors in Philanthropy and recipient 2015 Fithian Leadership Award.



Representing Nonprofit / Charitable Gift Planning Community Thought Leadership

Michael Kenyon, President and CEO of the National Association of Charitable Gift Planners the leading organization setting standards, providing education, resources and advocacy for charitable gift planners. He oversees the CGP Indianapolis based staff and a national network of over 100 councils and 8,000 CGP members promoting the value of charitable gift planning to legislators in D.C. and nationally speaks on the role of advocacy in the nonprofit sector.

and leading financial service and nonprofit associations and their members, professionals, financial service companies and nonprofits, small and large employers, technology companies, municipalities, and the news media in supporting and participating in the strategic venues.

We've assembled the following collection of tools to assist you, your branch office(s), your council(s) and chapter(s) to help to get this important message out to other leaders to support and to actively participate in the **Improving Financial Awareness & Financial Awareness Movement & Campaign** and programs.



1. **Place financial and planning editorial content on your website, newsletters, social networks,** and media advertising in support of National Financial Literacy Month and National Estate Planning Awareness Week. If you need content please contact us or see the sample articles Press & Industry Media Kits and Guides found under the Campaign tab at www.TheFinancialAwarenessFoundation.org
2. Add the ***We Support Improving Financial Awareness & Financial Literacy Co-Branded 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 customers built around financial, estate, and gift 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 preview a version of the ***"Building Blocks to Successful Financial Planning"*** and ***"Basic Building Blocks to Successful Estate Planning"*** we did for with the City of Monterey and the Monterey Public Library (Oldest public library in California) for their patrons and all Monterey Residents as a community gift at

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-MontereyPublicLibrary-PlanningfortheFuture-Presentations-040517.pdf>

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

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

- "Building Blocks to Successful Financial Planning"
- "Building Blocks to Successful Estate Planning"

Encourage your company 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 & 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.



5. **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.
6. **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

- **National Financial Literacy Month (April) & Estate 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

7. **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.
8. **Contact us if you can volunteer some staff or executive time** to help on national and international efforts.
9. **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>

10. **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>

The image contains two promotional graphics. The top graphic is for April 2017, celebrating the 13th Anniversary of National Financial Literacy Month. It features an illustration of a man and a woman standing next to a large clock. The bottom graphic is for October 16-22, 2017, celebrating the 9th Anniversary of National Estate Planning Awareness Month / Week. It features an illustration of a man and a woman in a boat. Both graphics include text about joining financial service and nonprofit associations, a link to a report and magazine, and the logo of The Financial Awareness Foundation.

We hope you will join us in communicating these important opportunities with your colleagues and actively supporting and participating in the Improving Financial Awareness & Financial Literacy Movement & Campaigns built around the strategic venues of **National Financial Literacy Month** and **National Estate Planning Awareness Month/Week**.



The Foundation's High Priority Campaigns & Programs

Our high priority items revolve around implementing our mission to serve as a nonpolitical "financial awareness advocate" to significantly improve financial awareness and financial literacy. They include:

1. **Advance our Infrastructure** to touch and serve more of the general public, financial service and nonprofit professionals, educational institutions, municipalities, and employers.
2. **Expand Active Participation & Support for The Improving Financial Awareness and Financial Literacy Movement & Campaigns** to touch everyone at least twice a year with the essential principles of smart personal financial management built around the strategic venues of
 - National Financial Literacy Month
 - National Estate Planning Awareness Month/Week
3. **Launch *The Financial Knowledge Community's*** Public, Professional, and Nonprofit portals
 - Inform and educate the general public, in an entertaining format, to the essential principles of smart personal financial management.
 - Motivate the public to take action to get and keep their financial house in order
 - Guide the public to find the right professionals to cost effectively implement and update their financial, estate, and their charitable giving plans.
 - Help bring together and educate financial service and nonprofit professionals to better serve their clients, general public and potential donors.
4. **Advance our Publishing and Research Activities**
 - Publications
 - ✓ Books & eBooks – [we have completed our first 3 publications](#)
 - ✓ Feature Articles – we have completed a collection of over 125 feature articles
 - ✓ [Research Reports and White Papers](#)
 - ✓ Specialty materials - Smart Phone Apps, Financial Games, Calendars, Tips & Blogs
 - Educational Programs & Content
 - ✓ [The Financially Green Organization Certification Program™](#) for employees
 - ✓ [The Your financial PARTNER University & College Program™](#) for graduating students, faculty and staff, and alumni
 - ✓ Seminars / Live & On-Demand Webinars – we have two scripted presentations
 - ✓ Complete the development of a unique multimedia eLearning platform to also deliver the above content in a memorable, educating, and entertaining manner.
 - ✓ Work with K-12 through college and graduate school education providers to imbed the essential principles of smart personal financial management into curriculums.
 - ✓ Work with financial service and nonprofit organizations, educational institutions, employers, membership organizations, and municipalities to provide their employees, members, alumni, and residents with the essential principles to smart personal financial management.
 - ✓ Continuing Education (CE) for professionals
 - Speakers Bureau & Strategic Relationships
5. **Open *The International Improving Financial Awareness & Financial Literacy Center*** to
 - Advance research projects
 - Serve as a Think Tank
 - Provide classes, workshops, and conferences
 - Advance our personal and professional publishing activities
 - House The Financial Awareness Foundation
6. **Launch a Major Scholarship Challenge** to provide the next generation of financial service and nonprofit professionals with the best tools to service their clients.
7. **Expand our Capital Campaign Fundraising Efforts.**



Capital Campaign

Over nine years of planning and thousands of volunteer hours have gone into developing the strategic plans and the foundation's infrastructure along with the initial Improving Financial Awareness & Financial Literacy Movement and campaigns, content and other intellectual properties.

Up to now The Foundation's executive team, Board of Directors, Advisory Board, Ambassadors and the various associates are entirely a volunteer team. The Foundation has grown to the stage that it requires ongoing "hands-on" management, an advanced website and technology tools to strategically plan, implement and manage relationships, programs and initiatives.

Our capitalization goals are to raise \$10 million over the next 3 years to properly capitalize The Foundation. This will allow us to further advance and support our campaigns and programs with appropriate staff and technology infrastructure. We are seeking lead philanthropists and / or sponsors who see the importance of our mission and appreciate our accomplishments to-date and who will assist us by initially capitalizing us with \$1 million each along with other appropriate resources. Further we are also looking for additional strategic partners, volunteers, donors and supporters to help with our improving financial awareness and financial literacy campaigns and programs.

Do you have any ideas here? Can you help us?

Once properly capitalized, as a 501(c)(3) nonprofit organization The Financial Awareness Foundation anticipates generating sustainable operating resources to implement its programs and financial awareness campaigns, and support team through publishing, professional continuing education programs and content, generous grants, sponsorships, donations, and contributions of time, services, intellectual property, and money from the public and supporters, dedicated volunteers, philanthropists, supporting nonprofits, educational institutions, and associated financial service and nonprofit organizations and technology companies that see the importance of our work.

Potential Sources of Revenues: As a 501(c)(3) nonprofit organization, The Financial Awareness Foundation has the opportunity to generate initial capitalization and ongoing operational revenues and funding from the following:

1. Publishing
2. Continuing Education for Professionals
3. Financially Green Organizations Certification Programs & Challenges™
4. Your *financial* PARTNER University / College Programs™
5. Philanthropists
6. Grants from grant giving nonprofits and municipalities
7. Sponsorships
8. Donations from Financial Services Associations, Professionals, and Companies
9. Donations from Nonprofits Associations, Professionals, and Nonprofits
10. Donations from General Public
11. Bequests
12. Planned Giving Programs

We are looking for the right philanthropists, grant giving foundations, strategic partnerships and sponsorships, and concerned individuals to strategically and financially assist us. Can you help us with appropriate introductions?



We Welcome Your Support In Being Part of the Solution

The Foundation is in a unique position to significantly help improve financial awareness and financial literacy by serving as a nonpolitical “financial awareness advocate” for the general public, financial service and nonprofit professionals and their organizations, educational institutions, employers, and municipalities. We are taking an active leadership role to recognize thought leading organizations and their professionals 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 a growing concentrated personal finance content media blitz campaign every six months around the strategic venues of

- National Financial Literacy Month (April)
- National Estate Planning Awareness Month / Week (October)

We also deliver and develop exceptional educational content to the general public and to financial service and nonprofits professionals and their organizations, to educational institutions and employers that support the public’s financial and estate planning and charitable planning needs.

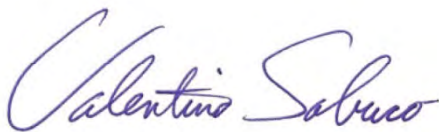
We are hard at work to become the ‘foundation of choice’ for improving financial awareness and financial literacy.

We welcome your assistance and support. To learn more about us and our financial awareness campaigns and efforts, and ‘**how you can make a meaningful difference**’ visit us at www.TheFinancialAwarenessFoundation.org and join our new discussion group on [LinkedIn](#).

If you have further ideas or require additional information about us, the improving financial awareness & financial literacy movement, campaigns, programs and activities, or to discuss volunteer activities, sponsorships, planned gifts, and contributions / 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, CFP® , AEP®

Executive Director & Publisher

The Financial Awareness Foundation

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

“Improving financial awareness & financial literacy...”SM

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