



### The Your financial PARTNER® 1/2 page tabloid Overview & Collection

The Your financial PARTNER® 1/2 page tabloid size YFP System & Life Events Features provides readers with the basics on how to plan for the big events in life that currently or inevitably will affect their financial well-being and their families.

We are pleased to present the content for the Your financial PARTNER Personal Financial Management System along with over 125 Life Events Features. The following is a listing of

our current library of Life Event Features. The features are available in a Microsoft® Word® file and most include a “Main Article” (averages between 1000 to 1200 words), supported by a “Checklists”, a “Resource Center” web-links, “Today’s Thought”, along with a special graphic suggestion. Many of the features also contain complementary downloadable “Your financial PARTNER Forms” in a Microsoft® Excel® file. The average overall word content of these features is ~ 1200 words.



The wealth of information contained in each Life Event Feature makes excellent timely content for

1. Newspapers – print and online
2. Newsletters
3. Blogs
4. Feature articles for customer communications
5. Your website
6. Co-Branded offerings to other businesses and customers

When shared as a “library of life event features” this rich assortment financial information becomes an engaging collections of valuable guides, checklist, forms, thoughts, and entertaining tools that will **keep readers coming back again and again** for more and thanking you each time for access to this valuable resource.



Here are links to a few sample feature articles:

- \* 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>

### YOUR PERSONAL FINANCIAL MANAGEMENT SYSTEM

1. Organization and planning are your keys to success
2. Keep your financial house in order
3. Quickly getting your paperwork in order
4. Take your financial inventory now
5. Create your own cash flow plan
6. Get the most out of your hidden paycheck
7. Financial plans match your goals and personality
8. Decide what's really important to you
9. When will you be financially independent?
10. Plan for your major expenditures
11. Investment planning is a life-long process
12. Tax planning is a life-long process
13. Avoid financial surprises through insurance planning
14. Protect family's future through estate planning



### CAREERS, EDUCATION & YOUR BUSINESS

1. Strategies to pay for college education
2. Make the most of your employment benefits
3. Pros & Cons of starting your own business
4. Carefully explore marriage of your employment benefits
5. Selecting the right college
6. Ways to finance your start-up
7. Do your homework before making a job change
8. Using a business plan as roadmap for success
9. Acing the all-important job interview
10. Structuring employment benefits for a new baby
11. Should we start our own business?
12. What are your benefits worth?
13. How does your current job compare?
14. Choosing the right college requires homework
15. Starting a business could be a blessing or a curse
16. Coordinating your employment benefits
17. How to handle an exit interview professionally
18. Some employee benefits are tax deductible





## KIDS MONEY

1. Leading your kids down the yellow brick road
2. Introducing kids to budgeting
3. How to teach your kids smart shopping
4. Introducing teen to personal banking
5. Introducing kids to the “birds and bees” of credit cards
6. Teaching kids about personal finance
7. Introducing kids to investing



## FAMILY & HEALTH CARE

1. The financial ABC's of having a baby
2. Leading your kids down the yellow brick road
3. Effective estate planning puts your house in order
4. Save family headaches by naming beneficiaries wisely
5. Goal setting provides roadmap to the future
6. Protect your future with estate planning
7. Long life together begins with a frank talk about finances
8. Taking care of aging parents
9. Executor's responsibilities should not be taken lightly
10. Introducing kids to budgeting
11. The serious business of living together
12. Dealing with divorce
13. Dealing with a funeral
14. Good budgeting keeps wedding costs under control
15. Ownership options have far-reaching affects
16. Handling the paperwork for a death in the family
17. Don't let a health care crisis become a financial crisis
18. Who should be your life insurance beneficiary?
19. The baby decision: To work or not to work
20. Who should own your life insurance?
21. Guide for using trusts in your estate plans
22. How to teach your kids smart shopping
23. Taking care of elderly parents
24. Addressing parents' elder care issues
25. Have a frank discussion before cohabiting



## FINANCIAL INDEPENDENCE & BEYOND

1. It is never too late - or too soon - to begin planning for your retirement
2. Planning puts financial independence in reach
3. Fitting 401(k) into asset allocation plans
4. Moving in retirement
5. Tax wise secrets for funding your financial independence
6. Why your investments need to grow, after you retire
7. Strategies for earning money in retirement
8. Use your home to help fund your financial independence
9. Allocating assets to meet retirement goals
10. Guidelines on withdrawing from the traditional IRAs
11. Why your investments need to grow in retirement
12. Your 401(k) choices after retirement
13. Maximizing your 401(k) contributions



## HOME & AUTO

1. Keep new car excitement from costing you money
2. Fixed or Variable - chose the mortgage that fits you best
3. What to do before you buy a new car
4. Homework pays off when buying a new home
5. Guide to buying auto insurance
6. Is auto leasing right for you?
7. Do your homework before buying a car
8. All about mortgages
9. Insurance to consider when buying a home
10. Negotiating a home purchase
11. Guide to buying Homeowner's Insurance
12. Preparing a checklist for moving
13. How much house can you afford?



## ESTATE PLANNING & ADMINISTRATION

1. Paperwork can pile high for an executor
2. Effective estate planning puts your house in order
3. Pitfalls to watch for when receiving an inheritance
4. Inheritance prompts update in estate plans
5. Receiving an inheritance can have its challenges
6. Estate Planning puts your financial house in order
7. Beneficiaries guide to estate administration
8. Save family headaches by naming beneficiaries wisely
9. Protect your future with estate planning
10. Executor's responsibilities should not be taken lightly
11. Dealing with a funeral
12. Ownership options have far-reaching affects
13. Handling the paperwork for a death in the family
14. Selecting a trustee do's and don'ts
15. Who should own your life insurance?
16. Guide for using trusts in your estate plans
17. What does a trustee do?
18. Planning for elders' legal affairs
19. Estate planning for the divorced and divorcing
20. Working with an estate planning attorney
21. An estate with no will can be a big mistake
22. Using a charitable remainder trust
23. Charitable gifts come in many forms



**YOUR MONEY**

1. Don't put all your dollar in one basket
2. Planning and organization keys to financial future
3. The Power of cash flow management
4. Free yourself of credit card debt
5. Don't gamble when buying insurance
6. Time is wisely invested in choosing the right financial advisors
7. Make money by winning the cost-cutting game
8. Charitable giving
9. Planning, organization are keys to financial success
10. New Year is time to put your financial house in order
11. Put paperwork in its place
12. Know where you stand
13. Gain control of your cash flow
14. Good financial planning gives a sense of security
15. Planning ahead for your major expenditures
16. Begin investment planning now
17. Begin your income tax planning now
18. Insurance planning to protect your future
19. Control credit card spending with a plan
20. Should I hire a money manager?
21. Charitable giving techniques
22. Newlyweds put combined insurance house in order
23. Reduce impulse spending to keep debt under control
24. Using your home to help fund your financial independence
25. Common investment mistakes to avoid
26. Making cash management easier
27. Naming a charity as your IRA beneficiary
28. Stocks, bond, and mutual funds: what do they mean?
29. Playing the cost-cutting money making game
30. Tax strategies to help you win the money game
31. Pros and cons of hiring a money manager
32. Creating an emergency fund
33. Is your insurance company safe?
34. Long life together begins with frank talk about finances
35. Selecting financial advisors
36. Money manager system puts your house in order
37. Planning for sufficient life insurance
38. Protect your financial plans from a health-care crisis
39. Asset allocation for your future
40. Don't put all your dollars in one basket
41. Tools for hiring a money manager
42. Power of a spending plan
43. Can you tell bad debt from good debt?



For additional information about Your *financial* PARTNER content please contact

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**The Financial Awareness Foundation**

“Your Financial Partner”, A 501(c)(3) Nonprofit Dedicated to Significantly

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

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Check out what others are doing about improving financial awareness and financial literacy by previewing the latest *Improving Financial Awareness & Financial Literacy Movement Campaign Report & Scrapbook*

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

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