



The FINANCIAL AWARENESS Foundation

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 We The People – the general public, the financial service and nonprofit professionals their organizations, educational institutions, technology companies and employers, municipalities and the news media.

We believe that EVERYONE needs to be financially literate and empowered to make better everyday money decisions. If not how are they are going to have any chance of living out a quality life, reach and maintain their personal and family financial dreams, and live out a debt free and secure financial future? Without this empowerment, many many people become a burden on family and friends, employers, local nonprofits and the ultimate safety net the local and federal government.

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 campaign venues, with educational and motivating content and reminders to get and keep your financial house in order with a current financial, estate and gift plans.

The Current Improving Financial Awareness & Financial Literacy Movement

Distinguished Co-Honorees **Representing Thought Leadership for**

- **Academia-The Executive Management Team The International Improving Financial Awareness & Financial Literacy Research Center at Makerere University – Uganda, Dr. Winston Tumpus Ireeta, Dr. David Ddumba, Dr. Juma Kasozi, Ammex Ssebide**
- **Representing Financial & Legal Services, Carrie Schwab-Pomerantz, Board Chair /President, Charles Schwab Foundation**
- **Representing News Media, Stephan R. Leimberg, CEO of Leimberg and LeClair, Inc.**
- **Representing Nonprofit / Kimberly Yee, Treasurer State of AZ & Elena Zee, CEO of the AZ Council on Economic Education**



The 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**
The Financial Awareness Foundation
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
- **Ken Ruff, Director**
Interim CTO, Retired businessman, Technologist & Digital Media Developer
- **Marie Burns, Director, CFP®**
Financial Advocate, Speaker and Author, Mind, Money & Motion
<http://mindmoneymotion.com/about/>
- **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



TFAF- Sampling Link Directory

1. The Financial Awareness Foundation

- ◆ The Financial Awareness Foundation website and 1 minute video
www.TheFinancialAwarenessFoundation.org
- ◆ The Financial Awareness Foundation Introduction
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf>
- ◆ The Financial Awareness Foundation Brochure
<http://www.thefinancialawarenessfoundation.org/pdf/TheFinancialAwarenessFoundationBrochure.pdf>
- ◆ Our Board
<http://home.thefinancialawarenessfoundation.org/board.html>
- ◆ IRS Determination Letter
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf>
- ◆ The Financial Awareness Foundation Annual Report & Business Plan
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FoundationReport&BusPlan.pdf>
- ◆ Serving as an Ambassador, Strategic Partner or Volunteer Overview & Application
<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>

2. The Improving Financial Awareness & Financial Literacy Movement & Campaign Materials

- ◆ The Improving Financial Awareness & Financial Literacy Movement Report & Magazine™
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
- ◆ 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>

3. TFAF – Complementary Personal Finance Knowledge

- ◆ TFAF Personal Finance Publication Set
<http://home.thefinancialawarenessfoundation.org/publications.html>
- ◆ TFAF-12 Month Financial Fitness Plan
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-12MonthFinFitnessCalendar.pdf>
- ◆ 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>

4. 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-YourFPUniversityProgramOverview.pdf>
- ◆ Overview - The Movement in Eastern Africa Countries
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Africa-TIFA-FLM.pdf>

Lastly 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. 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*™

