



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

Improving Financial Awareness & Financial Literacy™

Serving as an Ambassador or Volunteer of The Financial Awareness Foundation Overview

Serving as an Ambassador or Volunteer of **The Financial Awareness Foundation** can be fun and a valuable use of your time and skills, and a very rewarding experience.

As a community leader you can play a **VERY IMPORTANT** and strategic role in improving financial awareness and financial literacy, while creating goodwill and new opportunities for you and many nonprofits. This can be done by actively supporting and participating within the semiannual financial awareness movement built around the strategic venues of **National Financial Literacy Month** (April) and **National Estate Planning Awareness Month / Week** (3rd week in October).

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.
- 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.
- Too many young people and their families are burdened with excessive education 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 2014 graduated with an average of \$29,000 in student loan debt**.
- 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 leaders 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 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

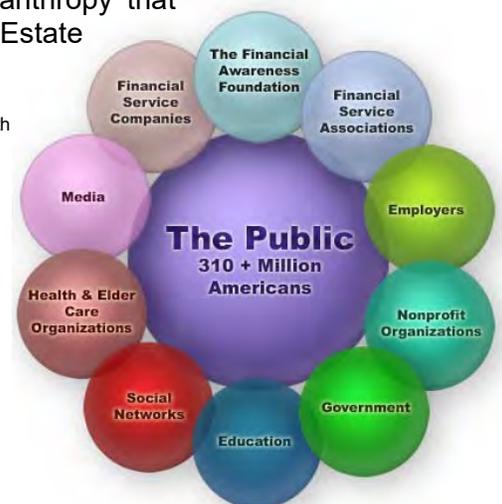
The plan is to touch the majority of the general public, high net worth individuals, financial service and nonprofit professionals and their organizations at least twice a year through these strategic venues, with educational and motivating reminders to get and keep their financial, estate, and gift 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 the 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. As we move into the 9th year of the **Improving Financial Awareness & Financial Literacy Movement** 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, & educational institutions that support the general public's financial and estate planning & charitable planning needs.

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.



Ways to Participate

You can play an integral role by supporting and participating in these semiannual financial awareness programs and personal finance content media blitz during April and October. Please join the Distinguished Co-Honorary Chairs for the 2017 Improving Financial Awareness & Financial Awareness Movement & Campaigns



Representing Academia, 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.

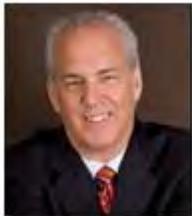


Representing Financial Services Thought Leadership

John A. Warnick, JD, CEO & Founder of Purposeful Planning Institute and Family Wealth Transitions & Solutions Along with his duties of the chief executive officer, John A. also is a practicing estate planning attorney that 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 the Purposeful Trust. 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.



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 such as CCH's Journal of Practical Estate Planning and its "Money and Meaning" column,

Cutting Edge Current magazine, Giving: Philanthropy for Everyone, Worth Magazine, Research Magazine, The Illinois State Bar Associations Of Counsel, the Chicago Daily Law Bulletin, Law Firm Benefits, and The American Medical Association's News. 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 of the Board of the International Association of Advisors in Philanthropy and recipient of the 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.



Here Are Some Fun and Easy Ways for You to Partake

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 estate planning editorial content within your websites, newsletters, social media groups, local newspapers, and radio/television/web-based shows, 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-IFAFI-Blue.jpg>

Here's a link to download the Co-Brandable graphic

<http://www.thefinancialawarenessfoundation.org/pdf/Co-brand-IFAFI-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 estate and financial 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 **"Basic Building Blocks to Successful Estate Planning"** we did with the American Endowment Foundation at <https://www.youtube.com/watch?v=LFUi77VUtEs&feature=youtu.be>

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"**



5. 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>

6. **Provide local seminars and workshops.** 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 professional associates to join in with you to host or take part in community-wide programs built around personal financial and estate planning during the months of April and October in support of improving financial awareness and financial literacy.
7. **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.
8. Help create some fun improving financial awareness & financial literacy challenges
- As to who has the best Financial Awareness
 - Community Activity
 - Checklist
 - Article
 - Campaign Slogan
 - Campaign Flyer
 - Website
 - Other possibilities?
 - As to who has the most financially literate
 - Chapter / Council
 - Employees
 - Members
 - City
 - State
9. Financially support these amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy by reallocating existing marketing dollars and or adding new dollars to these important biannual campaigns.
10. Ask your State Governor and other political contacts to provide supporting proclamations for National Financial Literacy Month April and for Estate Planning Awareness Week 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

11. Build and schedule some of your organizations annual marketing, branding, advertising, and social media programs around these strategic venues for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your members, their organization's employees, donors, and prospects.



12. Make contributions of your time, creativity, strategic planning, goodwill, contacts where appropriate, staff time. If you have available staff time available to let us know and make some it available for our worthy projects.
13. Help us with our fundraising and capital campaigns.
 - More than seven 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, Ambassadors and the various associates are entirely a volunteer team. The Foundation has grown to the stage that it requires ongoing "hands-on" management to strategically plan, implement and manage its relationships, programs and initiatives.
 - Our capitalization goals are to raise \$4 million to properly capitalize The Foundation to advance and support our campaigns and programs. 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.
 - Start by making a charitable contribution to us today
<http://home.thefinancialawarenessfoundation.org/donationgateway.html>
 - Your timely financial and strategic support is requested to help us take our initial work to the next level.
14. We are looking for additional
 - Strategic partners
 - Sponsors
 - Volunteers and supporters and Ambassadors
 - Philanthropists & donors
 - Distinguished Co-Honorary Chairs for The Improving Financial Awareness & Financial Literacy Movement
 - Board Membersto help with our capital campaign and improving financial awareness and financial literacy campaigns and programs. When they appear introduce them to us.
15. Introduce others to our programs
 - Help us introduce the Financially Green Organization Certification Program™ to employers, member based organizations, high schools, colleges and universities, and municipalities. Check out our overview through this link
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>
 - The Your financial PARTNER University / College Program™
Check out our overview through this link
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf>
16. Help us with our technology needs
 - Website
 - The Financial Knowledge Community
 - Public Portal
 - Nonprofit Portal
 - Financial Service Professional Portal
 - CRM
 - Content Management Systems
 - Project Management Systems
 - eLearning Platform
 - Video Development & Production
17. Help us find a home for **The International Improving Financial Awareness & Financial Literacy Center** at a prestigious University / College Campus.
 - 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



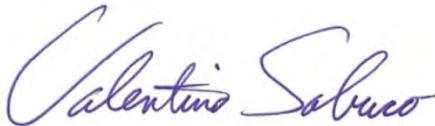
We welcome your assistance and support.

To learn more about us and our financial awareness movement, campaigns, programs and efforts, and **'how you can make a meaningful difference'** visit us at www.TheFinancialAwarenessFoundation.org and join our discussion group on [LinkedIn](#).

If you have further thoughts or require additional information about us and our financial awareness campaigns, programs and activities, or to discuss being an Ambassador and 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, CFP®, AEP®

Executive Director & Publisher

The Financial Awareness Foundation

A 501(c)(3) Nonprofit Dedicated to

"Improving financial awareness & financial literacy..."SM

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Help us do more by making a tax deductible contribution today!



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 literacy.

We serve as a nonpolitical “financial awareness advocate” for the general public, the financial service and nonprofits 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 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 legacy.



The Financial Awareness Foundation has two main focal points and they 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 a growing concentrated personal finance content media blitz campaign every six months through the strategic venues of
 - **National Financial Literacy Month**
 - **National Estate Planning Awareness Month/Week**
2. The Foundation delivers and develops exceptional educational content 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 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 are some links to provide you with further background information on us and **The Improving Financial Awareness & Financial Literacy Movement & Campaigns**.

The Financial Awareness Foundation

1. Our **Introduction 1 minute video** and website
<http://www.thefinancialawarenessfoundation.org>
2. **The Financial Awareness Foundation Fact Sheet**
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationFactSheet.pdf>
3. **The Financial Awareness Foundation Introduction**
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf>
4. **The Financial Awareness Foundation Annual Report & Business Plan**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FoundationReport&BusPlan.pdf>
5. IRS Determination Letter
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf>

The Improving Financial Awareness & Financial Literacy Movement & Campaigns

1. **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>
2. **The Improving Financial Awareness & Financial Literacy Movement Program Planner / Overview**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>
3. 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>
4. For the general public - **Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-PublicSupportfortheImprovingFinancialAwareness.pdf>
5. **Serving as an Ambassador or Volunteer**
<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf>

TFAF Improving Financial Awareness & Financial Literacy Programs

1. **The Financially Green Organization Certification Program™ Executive Summary & Overview**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>
2. **The Your *financial* PARTNER University / College Program™ Executive Summary & Overview**
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUUniversityProgramOverview.pdf>



TFAF Complimentary Set of Personal Finance Publications

Here is a link to download the 2017 set of personal finance publications. In the spirit of improving financial awareness and financial literacy you are welcome to share them with family and friends, staff and business associates as you see appropriate.



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

1. **Your financial PARTNER™ Overview – Essential Principles to Smart Personal Financial Management™**
This publication provides the reader with an overview of the **Your financial PARTNER Personal Financial Management System** and also identifies the essential principles to smart personal financial management and common mistakes to avoid and places them at your fingertips.
2. **Your financial PARTNER™ – The Personal Financial Management System, Guidebook and form set** - This is more than just another source of financial information and advice. It's a complete personal financial management system - a clear step-by-step process designed to help organize your affairs and provides you with the essential principles to smart personal financial management and a comprehensive set of common mistakes to avoid. These tools empower you to
 - Make better informed and productive everyday financial decisions
 - Save time and money with your financial advisors and service providers
 - Have the best opportunities to reach and maintain your personal / family financial dreams
 - Enjoy a financially secure debt free future
 - Advance your philanthropic and legacy plans.
3. **Your Estate Planning Organizer™** – All the tools you need to better organize, plan and manage your estate plan over your lifetime. Helps you develop and maintain a sound estate plan for you and your family. Organizing financial information is challenging for most of us. **Your Estate Planning Organizer** streamlines the estate planning process, helping you prepare your estate plan in a quick and easy manner saving you time and money.

TFAF White Papers

1. We Have a Lack of Financial Awareness & Financial Illiteracy Epidemic that Requires Immediate Attention
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-WhitePaper-LackofFinAware-FinIlliteracyEpidemic.pdf>

For additional information contact **Valentino Sabuco, CFP®, AEP®, the Executive Director / Publisher, at v.Sabuco@TheFinancialAwarenessFoundation.org 707.586.8620**

Help us do more by making a generous tax deductible contribution

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

