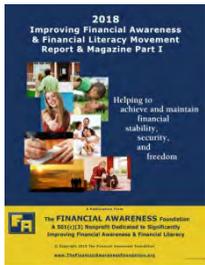


Complimentary Resources from The Financial Awareness Foundation

The Improving Financial Awareness & Financial Literacy Movement



The Improving Financial Awareness & Financial Literacy Movement Report & Magazine™

Now starting the 11th year of **The Movement**, this report provides a sampling of the community participation, including supporting proclamations from 21 US state governors, leading financial service, planned giving, and nonprofit associations and their professionals, a comprehensive collection of reports including how financially literate each state and country is, and what they are doing and so much more.

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



How Improving Financial Awareness & Financial Literacy Can Increase Your Bottom Line

For CPAs, Attorneys, CFPs, Wealth Managers and other 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 People - The General Public - Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All

For The People - The General Public - Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-PublicSupportfortheImprovingFinancialAwareness.pdf>



Program Overview / Planner

This provides an overview of **The Movement** and planning tools.

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>



Introduction Video to The Movement & The Foundation

Video

Note Slides

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TheMovementIntro-NotesTaking.pdf>

Slides

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TheMovementIntro-Slides.pdf>

<https://youtu.be/vJnupjmg6Ps>

[Link to Video](https://youtu.be/vJnupjmg6Ps)



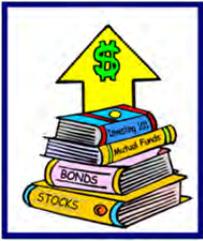
The FINANCIAL AWARENESS Foundation

A 501(c)(3) Nonprofit Organization Dedicated to Significantly
Improving Financial Awareness & Financial Literacy...™

959 Golf Course Drive, #273 ♦ Rohnert Park ♦ Sonoma County ♦ CA 94928 - (version 052819)

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Publications & Posters



Some Questions to Ponder – Check out your financial literacy

This is a Financial Literacy Quiz we developed years ago when we were part of a regional CPA firm. We would give this to clients in the waiting room while they were awaiting their annual tax interview. Most people answer yes to less than half these simple questions. This usually is concerning to that individual and opens the door to questions and conversation to work needed to help get their financial house in-order.

It's a GREAT practice builder for CPA and financial service professionals.

In the spirit of improving financial awareness and financial literacy you are welcome to put this on your own letter head.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Quiz-SomeQuestionsToPonder.pdf>



TFAF-12 Month Financial Fitness Plan

Personal finance doesn't have to be daunting or overwhelming; try the TFAF-12 Month Financial Fitness Plan

This can be used in a similar way at the Questions to Ponder noted above.

In the spirit of improving financial awareness and financial literacy you are welcome to put this on your own letter head.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-12MonthFinFitnessCalendar.pdf>



TFAF Problem solving gift

This defines The VERY BIG PROBLEM and offers a realistic solution.

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Flier-Problem-Solution-Gift.pdf>



The 2019 edition of TFAF Personal Finance Publication Set

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.



You can visit this link to receive your FREE copy of **TFAF Personal Finance Publication Set** – that includes smart money secrets and the essential principles to smart money management – the foundation to personal finance knowledge.

These are very special empowerment tools, not a Do-It-Yourself-Kit, it is a powerful tool to empower people to make better informed lifelong money decisions and to use and to work with financial professionals & product providers to get the best results from time & money.

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



Sample Articles for Financial Literacy Month (April) & Estate & Gift Planning Awareness Month (October) or any other time



Organization & Planning are YOUR KEYS to financial success (pdf)

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Org&PlanningAreKey-FreePubSet.pdf>



It's time to protect your family & your future (.pdf)

<http://home.thefinancialawarenessfoundation.org/pdf/5-3-SampleEPArticle.pdf>



Let financial planning make your difference (.pdf)

<http://home.thefinancialawarenessfoundation.org/pdf/6-3-SampleFPArticle.pdf>



Exposing kids to personal finances (.pdf)

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-ExposingKidstoFinance.pdf>



Charitable gifts come in many forms (.pdf)

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-CharitableGifts.pdf>



TFAF-Cost-Cutting Money-Making Game (.pdf)

<http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Cost-CuttingMoney-MakingGame.pdf>



TFAF 'No-Cost' Improving Financial Awareness & Financial Literacy Programs



The Financially Green Organization Certification Program™ Executive Summary & Overview

We have successfully piloted 'no-cost' community programs like what the City of Monterey and its Public Library (The oldest in California) are doing for their patrons and the Greater Monterey Bay Area Residents as a Community Gift.

The workshop link below let you see all the downloads of presentation materials as well as videos of

- ***Building Blocks to Successful Financial Planning***
- ***Building Blocks to Successful Estate & Gift Planning***

If you click on the October 2017 tab you can actually see a set of all the presentation materials including a recording of the materials that was circulated on their cable TV network along with our complimentary TFAF-Personal Finance Publication Set. We have built a local speakers bureau of over 30 financial service professionals that have now served as presenters and moderators for these presentations. These presentations are updated annually. They can be condensed and expanded as appropriate with the time available and kind of audience.



What do you think about encouraging your community and other communities you touch to do something like this?

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>

http://www.thefinancialawarenessfoundation.org/pdf/Monterey-FPFlier_2018-031518.pdf

Links to videos and materials

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



The Your financial PARTNER University / College Program™ Executive Summary & Overview

Universities and Colleges are in a strategic position to materially improve the lives of its students, alumni, faculty and administrative personnel, and supporters. This happens through their current education programs and through a new addition to life-long learning and a life-long connection to the people that make up their community.

By providing graduating students, faculty and administrative personnel, alumni, and supporters (The Community) access to the Your financialPARTNER University / College Program™ you are building a lifelong bond and social media connection while giving your community the secrets of smart money and essential principles to smart money management - the foundation to personal finance knowledge. This is an excellent life-long learning program for graduating students, faculty and staff, and alumni while helping with development efforts at schools you touch.

These have been piloted at the University of Miami - School of Law for its graduating class, the student athletes at Sonoma State University to its graduating athletes, and (USC) University of Southern California Emeriti College, and Miami Dade College which launched the first Improving Financial Awareness & Financial Literacy Student Club.

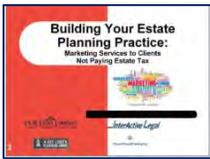
We've established the first ***The International Improving Financial Awareness & Financial Literacy Research Center at Makerere University in Uganda***. They are the largest university in Uganda with a student enrollment of over 39,000. We plan to link this with other campuses around the world.

Wouldn't it be great to introduce this as a gift program for graduating students, faculty and staff, and alumni at universities and colleges you touch, following on with semi-annual updates during each April and October?

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf>

<https://emeriti.usc.edu/resources/financial-literacy/>





Building Your Estate Planning Practice: Marketing Services to Clients Not Paying Estate Tax – with Marty Shenkman

This program is designed for practitioners (estate planners, attorneys, wealth advisers, insurance brokers, etc.) and will address how advisers can educate current and prospective clients on the importance of financial, and estate planning. This Webinar will present and discuss a consumer PowerPoint webinar which can be used in this process. The objective of the program will be to guide practitioners on how to educate your local community market their services, especially at a time when many consumers mistakenly believe that estate and gift planning is not relevant or not important because of the high tax exemptions. The handout materials will include the actual PowerPoint which practitioners can customize and use in educating your local community marketing their practices.

Links to video

www.shenkmanlaw.com/webinars

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Resources.pdf>

The International Improving Financial Awareness & Financial Literacy Movement



The East Africa Movement

Over the last couple years global financial literacy initiatives are increasing and we are contacted regularly for assistance and ideas from around the world. In 2018 we began assisting in the creation of **The Improving Financial Awareness & Financial Literacy Movement in Kenya, Uganda and Tanzania**; this will touch ~ 150 million people.

We are starting dialogs about doing the same other countries around the world.

Do you have relationships in a country that you would like to help establish The Movement within?



The Movement in East Africa

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-Africa-TIFA-FLM.pdf>



The Movement in Kenya

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Kenya-ExecSum.pdf>



The Movement in Uganda

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Uganda-ExecSum.pdf>



The Movement in Tanzania

<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-TIFA-FLMovement-Tanzania-ExecSum.pdf>



About - The Financial Awareness Foundation

 <p>The Financial Awareness Foundation Improving Financial Awareness & Financial Literacy™ www.TheFinancialAwarenessFoundation.org</p>	<p>The Financial Awareness Foundation, a 501(c)(3) nonprofit, is on a mission is to significantly help solve a major social problem dealing with the lack of financial awareness and financial literacy. The Foundation has taken a leadership role in The Improving Financial Awareness & Financial Literacy Movement, with its semi-annually concentrated personal finance content media blitz through the strategic campaign venues of Financial Literacy Month (April) and Estate & Gift Planning Awareness Month (October). The goal is to touch and encourage everyone at least twice a year to get and keep their financial house in order with current financial, estate & gift plans</p>
<p>Website</p>	<p>www.thefinancialawarenessfoundation.org</p>
<p>Fact Sheet</p>	<p>http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationFactSheet.pdf</p>
<p>The Financial Awareness Foundation Introduction</p>	<p>http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf</p>
<p>IRS Determination Letter</p>	<p>http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf</p>
<p>Serving as an Ambassador or Volunteer</p>	<p>http://home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf</p>
	<p>Valentino Sabuco Executive Director for The Financial Awareness Foundation that has helped pioneer the ‘fee-only’ the personal and business financial planning profession over the last 40 years as a principle of CPA firms and through his private practice, syndicated columns, books and publishing and nonprofit activities.</p>
<p>○</p>	<p>http://home.thefinancialawarenessfoundation.org/pdf/Sabuco-TFAF-Intro.pdf</p>

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.



Please let us know if you would like any additional information and if we can assist you in any way.

Wishing you all the very best,

Valentino Sabuco, Executive Director

The Financial Awareness Foundation

A 501(c)(3) Nonprofit Dedicated to Significantly
"Improving financial awareness & financial literacy..."

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www.TheFinancialAwarenessFoundation.org

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



The FINANCIAL AWARENESS Foundation

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