

The Financial Awareness Foundation TFAF - Background

The Financial Awareness Foundation, a 501(c)(3) nonprofit organization devoted to significantly helping to improve financial awareness and financial literacy.



We serve as a nonpolitical 'financial awareness advocate' for the general public – We The People, the financial service and nonprofit professionals, financial product providers and their organizations, educational institutions, municipalities, tech companies, employers and the news media.

♦ Are you aware of The Improving Financial Awareness & Financial Literacy Movement?

To help address the global lack of financial awareness and the financial illiteracy epidemic over a decade ago in the USA we began taking an active leadership role to recognize organizations and their management, and individuals that are championing improving financial awareness and financial literacy. We are then uniting them with other associations, organizations, nonprofits, educational institutions, municipalities, employers, the news media and concerned individuals to actively focus this vast community resource into ***The Improving***



Financial Awareness & Financial Literacy Movement with its semi-annual concentrated personal finance content media blitz around the strategic campaign venues that celebrate

- ✓ **April being known as Financial Literacy Month** and six months later with
- ✓ **October being known as Estate & Gift Planning Awareness Month.** (We worked with Congressman Thompson's Office during 2007 and 2008 to help create an Estate Planning Awareness proclamation that was co-authored by 50 bi-partisan Congresswomen & Congressmen; we have helped advance and promote it since.)

The plan is to touch everyone - the general public, every woman, man and child, rich or poor - at least twice a year through these strategic venues, with educational and motivating materials and reminders to get and keep their financial house in order with a current financial, estate, and gift plans. Thus empowering 'The People' to make informed lifelong financial decisions.

The objective is to encourage government, financial service organizations and their professionals, corporate, academic, and social service leadership; and the news media to actively support and participate in The Movement to alert, educate, motivate and assist everyone to get and keep their financial house in order with a cost effective current financial, estate and gifting plans.

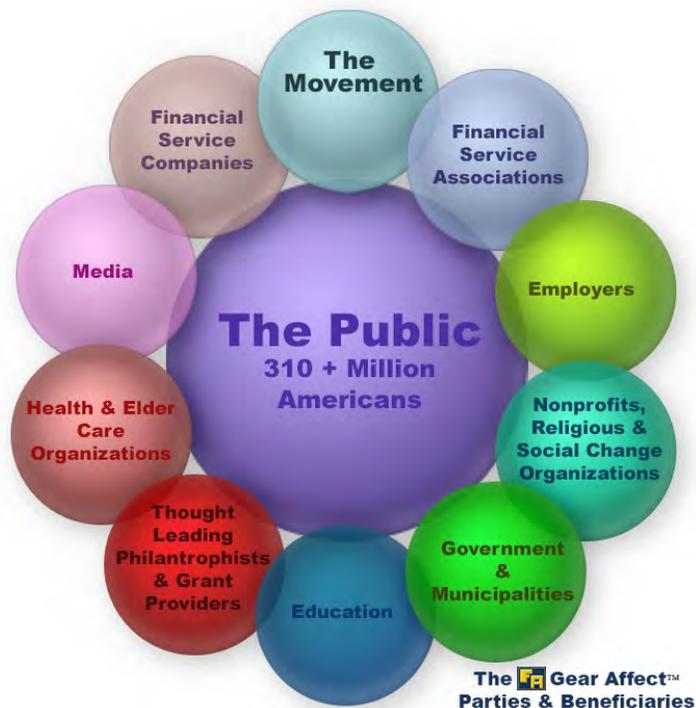


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Improving Financial Awareness & Financial Literacy...™

We understand that this is a massive undertaking; however, it can be accomplished through leading organizations and their associates that include:

- Financial Service Associations / Members
- Employers / Technology Companies
- Nonprofits / Religious / Social Change Organizations
- Government
- Educational Institutions
- Thought Leading Philanthropists / Grant Providers
- Health / Social Welfare Organizations
- Media / Social Media / Concerned Parties
- Financial Service Companies / Professionals



Together these organizations and their leadership represents a direct communication channel to all The People. Further, they have a vested interest in helping to raise the quality of life for all citizens, as it will also improve their businesses, and allow them to do their jobs more effectively.

Below is a link to our annual **The Improving Financial Awareness & Financial Literacy Report & Magazine**. This provides a sampling of the community participation, including supporting proclamations from over 20 US State Governors, leading financial service, planned giving, and nonprofit associations and their professionals, and academia and news media efforts along with a comprehensive collection of reports including how financially literate each state and country is, and so much more.

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

For financial service professionals

- ✓ **The Improving Financial Awareness & Financial Literacy Movement Can Increase Your Bottom Line**

<https://www.home.thefinancialawarenessfoundation.org/pdf/TFAF-Advisors-CanIncreaseYourBottomLine.pdf>

For We The People - The General Public –

- ✓ **Supporting Improving Financial Awareness & Financial Literacy Is A Winning Opportunity For All**

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

♦ **Educational Content and Programs**

Our Foundation also delivers and develops exceptional educational content and programs for We The People - the general public – rich to poor, and for financial service, nonprofit, and charitable gift planning professionals, and educational institutions that support the public's financial and estate and gift planning and charitable planning needs.



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♦ **Creative Thinking and Problem Solving**

We believe that NOW is the TIME for some CREATIVE THINKING & Problem Solving & Making Things Better For you and your family. What creative ideas / thoughts do you have for solutions / new products / jobs / business opportunity creations during and after the COVID-19 Healthcare Crisis & Financial / Economic Crisis? Here are some random thoughts; please add your ideas and circulate it to your family & friends / colleagues and encourage them to do the same!!!

<https://www.home.thefinancialawarenessfoundation.org/pdf/TFAF-CreativeSolutions.pdf>

♦ **The TFAF Building Blocks to Successful Financial Planning Presentation Series & Curriculum**

We have four dynamic and powerful 90-minute scripted PowerPoint presentations, which can be accompanied by the TFAF Personal Finance Publication Set, to provide the viewer with a memorable lifelong learning experience. They have been used domestically and internationally as content for classroom interaction, webinars and conferences, regional and community workshops, and as in-house employee and member benefits as improving financial awareness and financial literacy programs.

These can also be used with associations, membership organizations and employers.

https://www.home.thefinancialawarenessfoundation.org/pdf/TFAF-Monterey-FinLiteracyPresFlier_Octr4-2017.pdf

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

<https://www.home.thefinancialawarenessfoundation.org/pdf/DraftSlides1of4.TFAF-KLS-Emeriti-BBSFP-Intro-2020.pdf>

<https://www.home.thefinancialawarenessfoundation.org/pdf/TFAF-FAAssociation-CFLE-AxisPensions-Intro1of4-Slides.pdf>

♦ **Improving Financial Awareness & Financial Literacy Programs for Universities & Colleges**

We've successfully piloted programs 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. In 2019 at Makerere University in Uganda we established the first International Improving Financial Awareness & Financial Literacy Research Center; Makerere University is the largest University in Uganda. (Student enrollment of 35,000) In 2020 we helped establish **The International Improving Financial Awareness & Financial Literacy Association** at The University of Ghana. (Student enrollment of 40,000). Our plans are to strategically globally link together universities and colleges through these The Research Centers / Association.

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

USC-Financial Literacy Website	https://emeriti.usc.edu/resources/financial-literacy/
The International Improving Financial Awareness & Financial Literacy Association at the University of Ghana	Under construction - Soon to be released http://ugbs.ug.edu.gh/association
Our Mission is to Significantly Improve Financial Awareness & Financial Literacy in Ghana	

Can you help us to create The International Improving Financial Awareness & Financial Literacy Research Centers at domestic or international Universities you are touching?



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◆ Increasing Global Financial Literacy Initiatives

The Movement began in the USA over a decade ago; global financial literacy initiatives are increasing; we are contacted regularly for assistance, content, and ideas from around the world. In 2018 we began The Improving Financial Awareness & Financial Literacy Movement in several East African Countries that will touch ~ 150 million people; modeled after our work in the US. In 2020 The Movements expanded into West Africa, Brazil, and India. We now have **The Movement** developing in over 12 countries within 4 continents. We also have initiated development activities and discussions for **The International Improving Financial Awareness and Financial Literacy Research Centers** in over a dozen Universities, domestically and internationally. They are taking leadership roles within the countries and community's improving financial awareness and financial literacy activities.



<https://www.home.thefinancialawarenessfoundation.org/pdf/TheMovementWorldWide.pdf>

◆ TFAF Research

We are in the early stages of establishing **The International Improving Financial Awareness and Financial Literacy Research Centers** at universities around the world to serve as a 'Think Tank' and as a 'improving financial awareness and financial literacy advocate' and to perform ongoing Longitudinal Technical Research to monitor The Movement and its advancements, make improvements where necessary, and provide political leadership with valuable economic insights. Improving Financial Awareness & Financial Literacy is not a get rich quick process; it's a lifelong skillset. To measure what's working and what's not requires longitudinal studies. This research can provide critical feedback on many financial and economic matters as a service to political and business leaders. We are working on a Quality of Life Family Index for each country and community that will be a powerful indicator.

Annual Wealth Advisor Confidence Survey – Report

↓ DOWNLOAD

TFAF- Improving Financial Awareness & Financial Literacy Background Resources

↓ DOWNLOAD

TFAF- Improving Financial Awareness & Financial Literacy Movement Report & Magazine

↓ DOWNLOAD

TFAF- Key Financial Literacy Definitions

↓ DOWNLOAD

TFAF- Creative Thinking and Problem Solving

↓ DOWNLOAD



The FINANCIAL AWARENESS Foundation

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- ◆ **We believe that EVERYONE needs to be financially literate and empowered to make better everyday money decisions.**

If not how are they going to have any chance of living out a quality life, reach and maintain their personal and family financial dreams, and enjoy a debt free and secure financial future, pass on your values, knowledge and assets to future generations and your charitable causes to help make this a better world? Without this empowerment, many many people become a burden on family and friends, employers, local nonprofits and the ultimate safety-net the local and national government.



You can visit our website at www.thefinancialawarenessfoundation.org 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.

The Foundation to Financial Awareness & Financial Literacy

Financial planning is a lifelong process; that's why The *financial* PARTNER System illustration is an "infinity" symbol, representing a continuous cycle. Once you've addressed the elements of **Getting Organized** and **Financial Planning** and learned the secrets and essential principles of smart money – the foundation to personal finance knowledge – it's simply a matter of reviewing regularly and updating areas as required.



Staying organized and planning wisely are keys to financial success. Short of winning the lottery or inheriting millions, few people attain and maintain financial success and security without forethought, a strategy, and ongoing management. Learn this powerful simple process to make better everyday money decisions so you have the best chance of watching your personal and family dreams become a reality.

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The Infinity Lifelong Learning Symbol

These are very special tools designed 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.



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In the spirit of improving financial awareness and financial literacy you are welcome to share these with your colleagues, friends and family. These special empowerment tools are designed to help the reader

- ◆ Make wiser informed lifelong money decisions
- ◆ Work more efficiently with financial professionals & product providers to get the best results from time & money
- ◆ Get and keep their financial house in order by having a current financial, estate and gift plans
- ◆ Pass on your values, knowledge and assets to future generations
- ◆ Have the highest probability to reach your family dreams while you live out a financially successful life.

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. 😊



- ◆ **To learn more about The Movement or become a volunteer or Ambassador or Strategic Partner in the US or worldwide.**

www.home.thefinancialawarenessfoundation.org/pdf/TFAF-Ambassador-Volunteer-Overview.pdf

Hope you find this of interest and look forward to our meeting.

Thanks for your consideration.

Stay safe and healthy – there's lots of work to do and fun to be had!!!! - wishing you, your loved ones and colleagues all the very best, ALWAYS,

Valentino

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www.TheFinancialAwarenessFoundation.org

We believe that sharing the essential principles to personal finance knowledge changes your world and the world around you... FOREVER!!!

Help us do even more....



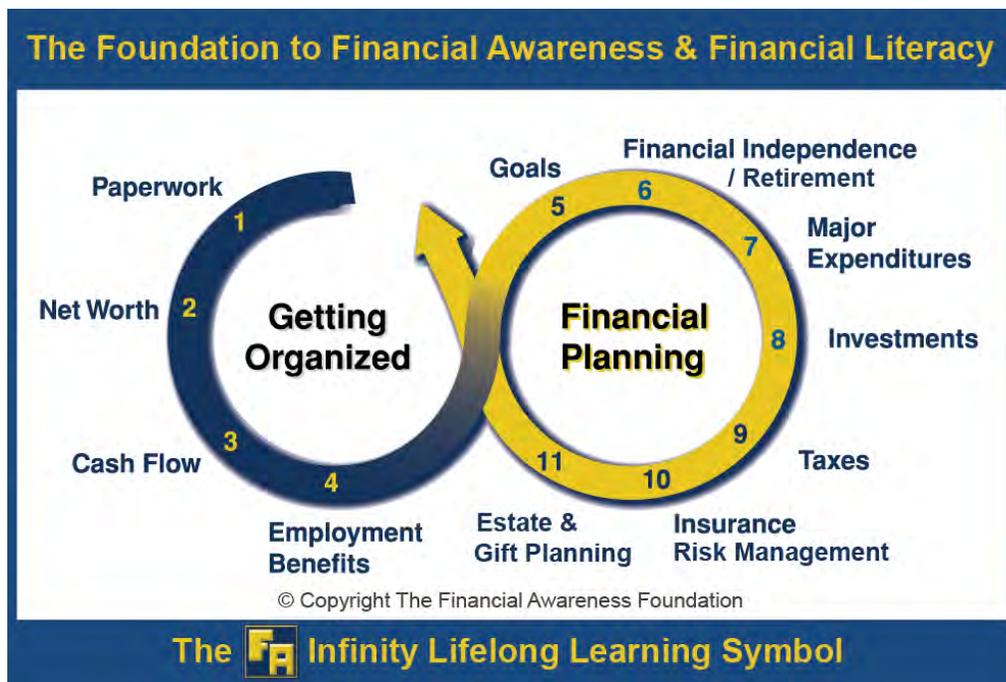
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Valentino Sabuco, Executive Director for The Financial Awareness Foundation

Valentino is a lifelong advocate for improving the public's and professional's financial awareness and their financial literacy; he began pioneering the financial planning industry in the US in the mid 1970's, and helped establish the 'fee-only' financial planning profession while serving as a principal within several Bay Area CPA firms, and private practices. Over a decade ago, helped establish **The Improving Financial Awareness & Financial Literacy Movement** in the US, which has now expanded into 4 continents within over 12 countries. Also, have initiated discussions and development activities for **The International Improving Financial Awareness & Financial Literacy Research Centers** in over a dozen universities, domestically and internationally. They are taking leadership roles of improving financial awareness and financial literacy activities within their communities and countries.

We have noted domestically and internationally that in many locations personal financial management is not being adequately addressed at home and school, or by financial professionals. To address this deficiency, we began developing content and created **The FA Infinity Lifelong Learning Symbol** to help individuals and professionals to easily and quickly identify areas in their comprehensive financial planning that maybe out of date or hasn't been adequately addressed.



<https://www.home.thefinancialawarenessfoundation.org/pdf/Sabuco-TFAF-Intro.pdf>

<https://www.linkedin.com/in/valentino-sabuco-623bb52/>

<https://www.home.thefinancialawarenessfoundation.org/pdf/TheMovementWorldWide.pdf>

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



DONATE NOW

Become a  Supporter Today



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