

Background Resources a Click Away

In support of the improving financial awareness and financial literacy campaigns the following resources have been assembled for your use. If you have additional supporting information to contribute please email it to V.Sabuco@TheFinancialAwarenessFoundation.org. Thank you.

1. **Press & Industry Media Kit** - For additional information about the financial awareness campaigns, download the full media kit, and see the latest Improving Financial Awareness & Financial Literacy Movement Report & Scrapbook please visit the Campaign tab at www.TheFinancialAwarenessFoundation.org/

and **Tools & Resources Section** at

<http://AdvancingFinancialAwareness.org>

2. **National Estate Planning Awareness Week** – 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 in 2008 Congressman Thompson 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. The full text of the proclamation can be found if you click onto or cut and paste the following URL into your web browser, enter, scroll down to **Downloads** and click on **About National Estate Planning Awareness Week**.

<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>

3. **National Financial Literacy Month** – in 2004 the Senate passed Resolution 316 that officially recognized April as National Financial Literacy Month. In 2011 President Obama signed a Presidential Proclamation proclaiming April as National Financial Literacy Month. The full text of the proclamation can be found if you click onto or cut and paste the following URL into your web browser, enter, scroll down to **Downloads** and click on **About National Financial Literacy Month**.

<http://www.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>

4. **Local and National Professional Contacts** - To contact financial and estate planning professionals and nonprofit professionals in your community, visit

- **AICPA** – Find a CPA –
 - www.aicpa.org/FORT_HEPUBLIC/FINDACPA/Pages/FindACPA.aspx
- **American Association of Attorney-CPA’s** – Find an Attorney – CPA
 - www.attorney-cpa.com/eweb/DynamicPage.aspx?Site=AAA-CPA&WebCode=IndSearch
- **Association of Fundraising Professionals** –
 - Leadership - www.afpnet.org/
 - Find a local chapter - www.afpnet.org/audiences/chapters.cfm?navItemNumber=525
- **CFP Board** – Find a CFP Professional –
 - www.cfp.net/
- **Martindale** – Find a Lawyer or Law Firm –
 - www.martindale.com/
- **NAEPC** – Find an AEP or Estate Planner –
 - www.naepc.org/designations/estate_planners/search#spec/AEP,EPLS
- **Partnership for Philanthropic Planning** –
 - Leadership www.pppnet.org/about/leadership_2013.html
 - Find a local chapter www.pppnet.org/councils.html#

Visit us at www.TheFinancialAwarenessFoundation.org and click on the Campaign tab to download the complete Press & Industry Media Kit, the Councils / Chapters / Branch Office Guide & Information Kit, and join our mailing list.



THE FINANCIAL AWARENESS FOUNDATION

A 501(c)(3) Nonprofit Organization Dedicated to Significantly
Improving Financial Awareness & Financial Literacy
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5. Research footnotes & links for improving financial awareness & financial literacy

1. 2015 Spring Improving Financial Awareness & Financial Literacy Report & Magazine[™]
 - a. <http://www.thefinancialawarenessfoundation.org/pdf/SpringCampaignReport&Magazine.pdf>
2. 2015 Fall Improving Financial Awareness & Financial Literacy Report & Magazine[™]
 - a. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
3. About National Financial Literacy Month
 - a. <http://home.thefinancialawarenessfoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf>
4. About National Estate Planning Awareness Week
 - a. <http://home.thefinancialawarenessfoundation.org/pdf/About-NationalEstatePlanningAwarenessWeek.pdf>
5. AICPA – 360 degrees of Financial Literacy
 - a. <http://www.360financialliteracy.org/Topics/Retirement-Planning/Social-Security/Sources-of-retirement-income-filling-the-Social-Security-gap>
6. Aegon Retirement Readiness Survey - 2015
 - a. <http://www.aegon.com/Documents/aegon-com/Research/2015-Retirement-Survey/Aegon-Retirement-Readiness-Survey-2015-Global-Report.pdf>
7. AARP
 - a. http://www.aarp.org/content/dam/aarp/research/public_policy_institute/econ_sec/2012/Social-Security-Whos-Counting-on-It-fs-252-AARP-ppi-econ-sec.pdf
8. CFP Board
 - a. <http://www.cfp.net/Media/release.asp?id=227>
9. Center on Budget and Policy Priorities
 - a. <http://www.cbpp.org/cms/index.cfm?fa=view&id=3260>
10. Center for Retirement Research at Boston College
 - a. How Does Aging Affect Financial Decision Making?
 - i. <http://crr.bc.edu/briefs/how-does-aging-affect-financial-decision-making/>
 - b. A Golden Age of Philanthropy Stills Beckons: National Wealth Transfer and Potential for Philanthropy
 - i. <http://campaign.r20.constantcontact.com/render?ca=2ca82112-5604-40b4-8952-c8eb1fba4295&c=286fbc80-40b0-11e3-ac06-d4ae52843dc7&ch=2875fe10-40b0-11e3-ac06-d4ae52843dc7>
 - c. Are Americans of All Ages and Income Levels Shortsighted About Their Finances?
 - i. <http://crr.bc.edu/briefs/are-americans-of-all-ages-and-income-levels-shortsighted-about-their-finances/>
11. Consumer Financial Protection Bureau
 - a. Financial well-being: The goal of financial education
 - i. http://files.consumerfinance.gov/f/201501_cfpb_report_financial-well-being.pdf
12. Demographics of the United States
 - a. http://en.wikipedia.org/wiki/Demographics_of_the_United_States
13. Employee Benefit Research Institute Retirement Confidence Survey
 - a. <http://www.ebri.org/surveys/rcs/>
 - b. www.ebri.org/pdf/FFE125.4June09.Final.pdf
 - c. www.ebri.org/pdf/publications/books/.../DB.Chapter%2006.pdf
14. Federal Reserve Board
 - a. http://www.minneapolisfed.org/publications_papers/pub_display.cfm?id=4230
 - b. <http://www.federalreserve.gov/pubs/bulletin/2014/pdf/scf14.pdf>
15. Financialcorps
 - a. http://financialcorps.com/bill-melinda-gates-foundation-seeks-mobile-money-and-financial-education-solutions/?utm_source=12.2.2014+Newsletter&utm_campaign=FC_Newswire_12.2.2014&utm_medium=email
16. JPMorgan Asset Management
 - a. The Millennials
 - i. https://www.jpmorganfunds.com/blobcontent/690/439/1323431015884_RI-WPMILLENNIALS.pdf
17. Kaiser Family Foundation
 - a. <http://facts.kff.org/chart.aspx?cb=58&sctn=162&ch=1725>
18. Knowledge @ Wharton
 - a. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2642>



News Media

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Promoting & improving financial awareness & financial literacy™

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19. MasterCard Financial Literacy Index Report (2014H1)
 - a. <http://www1.mastercard.com/content/intelligence/en/research/reports/2015/mastercard-financialliteracy-index-report-2014h1.html>
20. MetLife Demographic Profiles
 - a. www.metlife.com/searchresults?query=demographic+profile&and_on=Y&sel_path=metlife%2Fmmi%2Fresearch%2Findex.html&remoteUser=71.198.244.63-3947949424.30201431
 - b. MetLife Study of Employee Benefit Trends
 - i. <http://www.metlife.com/business/insights-and-tools/industry-knowledge/employee-benefits-trends-study/index.html#highlights>
21. Neighbor Works America
 - a. Survey – 1/3 of US Adults have no emergency savings
 - b. <http://www.neighborworks.org/Media-Center/Press-Releases/2015-Archive/March/One-in-three-U-S-adults-has-no-emergency-savings>
22. S&P Ratings Services Global Financial Literacy Survey
 - a. <https://www.mhfi.com/corporate-responsibility/global-financial-literacy-survey>
23. SEC
 - a. www.sec.gov/pdf/report99.pdf
24. SHRM Research Articles
 - a. <http://www.shrm.org/Research/Articles/Pages/default.aspx>
25. Social Security
 - a. Social Security 2016 Changes
 - i. <http://www.ssa.gov/news/press/factsheets/colafacts2016.html>
 - b. Social Security – A Profile of Older Americans 2011
 - i. http://www.aoa.gov/aoaroot/aging_statistics/Profile/2011/docs/2011profile.pdf
26. UBS and PwC
 - a. Billionaires: Master architects of great wealth and lasting legacies
 - i. <http://www.pwc.com/gx/en/financial-services/publications/assets/pwc-ubs-billionaire-report.pdf>
27. US Census Information
 - a. www.census.gov/
 - b. www.census.gov/compendia/statab/2011/tables/11s0540.xls - 2010-12-07
 - c. www.census.gov/sipp/workpapr/wp110_9005.pdf - 2009-09-08
 - d. <http://www.census.gov/programs-surveys/acs/data.html/>
 - e. The 2012 Statistical Abstract
 - i. www.census.gov/compendia/statab/cats/income_expenditures_poverty_wealth.html
 - f. Quick Facts
 - i. <http://quickfacts.census.gov/qfd/states/00000.html>
 - ii. <http://www.census.gov/quickfacts/table/PST045214/00>
 - g. The American Community Survey (ACS)
 - i. <http://www.census.gov/acs/www/data/data-tables-and-tools/>
28. US Dept of Health & Human Services
 - a. Health, United States, 2010
 - b. <http://www.cdc.gov/nchs/fastats/lifexpec.htm>
29. US News
 - a. http://finance.yahoo.com/news/pf_article_109508.html
 - b. <http://money.usnews.com/money/blogs/planning-to-retire/2010/01/12/the-4-biggest-sources-of-retirement-income>
30. WalletHub.
 - a. 2015's The Most & Least Financially Literate States in America.
 - i. <http://wallethub.com/edu/most-and-least-financially-literate-states/3337/>
31. Wells Fargo
 - a. https://www.wellsfargo.com/press/2011/20111116_80IsTheNew65



The FINANCIAL AWARENESS Foundation

Improving financial awareness & financial literacy™

Improving Financial Awareness Campaigns

To schedule an interview with our distinguished honorary co-chairs, learn more about **The Improving Financial Awareness & Financial Literacy Movement & Campaigns** built around the strategic venues of **National Financial Literacy Month & National Estate Planning Awareness Week** and or to receive complimentary estate and financial planning content and a link for your website, contact Valentino Sabuco, CFP®, AEP®, The Financial Awareness Foundation's Executive Director & Publisher at 707.586.8620, or v.sabuco@TheFinancialAwarenessFoundation.org.

