



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

Improving Financial Awareness & Financial Literacy™

Introduction Factsheet

History & 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 the public, the financial service and nonprofit 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 while they advance their legacy.

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, 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** (April) and 6 months later during
- **National Estate Planning Awareness Week** (October)

Further we also deliver and develop exceptional educational content for the general public, for financial service and nonprofit professionals, and educational institutions that support the public’s financial / estate planning and charitable planning needs.

The Financial Awareness Foundation is hard at work to become the ‘foundation of choice’ for improving financial awareness and financial literacy for the public, and amongst nonprofits, educational institutions, financial service professionals and their organizations, the news media, and employers..

Board - Leadership

Valentino Sabuco, CFP®, AEP®, Executive Director & Publisher

Executive Director & Publisher of 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 and the South Dakota Planning Company, LLC

www.sdplanco.com/Planning-Information/Management-Biographies.aspx

Ken Ruff, Director

Interim CTO, Retired businessman, Technologist & Digital Media Developer

Amar Sawhney, CFP®, Director

Professor of Architecture, School of Architecture, Miami Dade College,

www.thefinancialawarenessfoundation.org/pdf/Sawhney-TFAF-Board.pdf

Paul G. Schervish, M.Div., Ph.D., Director

Professor of Sociology and Director of the Center on Wealth and Philanthropy (CWP) at Boston College

www.thefinancialawarenessfoundation.org/pdf/7-3-HonoraryCoChairSchervish.pdf

Adam Strominger, Director

Planned Giving Director at Food for The Poor- the largest international relief agency in the United States

www.thefinancialawarenessfoundation.org/pdf/Strominger-TFAF-Board.pdf

The 2016 Improving Financial Awareness & Financial Literacy Movement Distinguished Co-Honorary Chairs

Representing Academia, Patricia D. White, JD, Dean of the University of Miami School of Law.

Representing Nonprofits, Andrew Watt, FlnstF, President & CEO, of the Association of Fundraising Professionals

Representing News Media, Susan R. Lipp, Editor in Chief of Trusts & Estates magazine, the WealthManagement.com Journal for estate-planning professionals, Penton Wealth Management team.

Representing Financial Services, xxxxx. To be announced shortly.

To see what our colleagues and associates did in the latest **Improving Financial Awareness & Financial Literacy Movement Report & Magazine™**

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



A 501(c)(3) Nonprofit Organization

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The Financial Awareness Foundation key link directory

1. The Financial Awareness Foundation website
www.TheFinancialAwarenessFoundation.org
2. Our Board
<http://home.thefinancialawarenessfoundation.org/board.html>
3. IRS Determination Letter
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-IRS-Determination-Letter-060414.pdf>
4. For the General Public – About Us
<http://www.thefinancialawarenessfoundation.org/pdf/AboutTFAF.pdf>
5. The Financial Awareness Foundation Introduction
<http://www.thefinancialawarenessfoundation.org/pdf/TheFAFoundationIntro.pdf>
6. The Financial Awareness Foundation Brochure
<http://www.thefinancialawarenessfoundation.org/pdf/TheFinancialAwarenessFoundationBrochure.pdf>
7. 2014-2015 The Financial Awareness Foundation Annual Report & Business Plan
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FoundationReport&BusPlan-2014-15vr.pdf>
8. The Improving Financial Awareness & Financial Literacy Movement Report & Magazine™
 - a. Spring
 - i. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-SpringCampaignReport&Magazine.pdf>
 - b. Fall
 - i. <http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FallCampaignReport&Magazine.pdf>
9. Press & Industry Media Kit
 - a. <http://home.thefinancialawarenessfoundation.org/campaigns.html#TFAF-Improving>
10. Financial Awareness Campaign & Program Planner
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-ImprovingFinancialAwarenessCampaign&ProgramPlanner.pdf>
11. TFAF Publications
 - a. Your financial PARTNER™ - The Personal Financial Management System
 - i. <http://home.thefinancialawarenessfoundation.org/publications/FPBrochure.pdf>
 - ii. <http://home.thefinancialawarenessfoundation.org/publications.html>
 - b. Your Estate Planning Organizer™
 - i. <http://home.thefinancialawarenessfoundation.org/publications/EPBrochure.pdf>
 - ii. <http://home.thefinancialawarenessfoundation.org/publications.html>
12. TFAF Webinars
 - a. Building Blocks To Successful Estate Planning
 - i. 2013 With The Stelter Company
<http://www.stelter.com/webinars.html>
 - ii. 2014 With The American Endowment Foundation
<https://www.youtube.com/watch?v=LFUi77VUtEs&feature=youtu.be>
13. The Financially Green Organization Certification Program™ Executive Summary & Overview
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-FinanciallyGreenOrganizationCertProgramOverview.pdf>
14. The Your financial PARTNER University / College Program™ Executive Summary & Overview
<http://www.thefinancialawarenessfoundation.org/pdf/TFAF-YourFPUniversityProgramOverview.pdf>

For additional information about us and the improving financial awareness & financial literacy movement, campaigns, programs and activities, or to discuss 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,



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The FINANCIAL AWARENESS Foundation

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