



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

Improving Financial Awareness & Financial Literacy™

To: Interested Parties
From: Valentino Sabuco, CFP®, AEP®, Executive Director & Publisher
Date: March 2016
Re: **Introduction to The Financial Awareness Foundation**

About The Financial Awareness Foundation

The Financial Awareness Foundation is a 501(c)(3) nonprofit that was established to significantly improve financial awareness and financial literacy. The Foundation's vision as an educational public benefit corporation is to teach, promote, motivate, and disseminate educational materials to the public, professionals, and nonprofits that will help the general public achieve and maintain financial stability, security, and freedom throughout their lives, while advancing their personal philanthropy.

With so many people on the verge of running out of money before their life expectancy and over half your friends and neighbors not having an up-to-date estate plans to protect themselves and their families we have a serious problem. This lack of financial awareness and financial literacy places a huge amount of pressure on families and friends, employers, nonprofits; as well as the government. This is not just a domestic challenge it is an international one. We feel the solution to these financial challenges revolves around financial education.

Purpose: The Foundation serves to benefit you by significantly improving financial awareness and financial literacy.

Vision: The Foundation envisions a world where every person has access to the right financial advice and the skills and tools to manage their finances so they can achieve and maintain their financial stability, security, and freedom throughout their lives, while advancing their personal philanthropy. We see this happening by significantly improving both the public's financial awareness and their financial literacy, while developing & assembling educational content to assist professionals in providing high-quality, cost-effective services to the public.

Mission: The Foundation serves as a nonpolitical “financial awareness advocate” for the general public, financial service and nonprofit professionals and their organizations, educational institutions, employers, and municipalities. Our mission is to significantly help solve a major social problem dealing with the lack of financial awareness and financial literacy.

We believe that teaching financial awareness, financial literacy and the essential principles to smart personal financial management are very important as this empowers people to

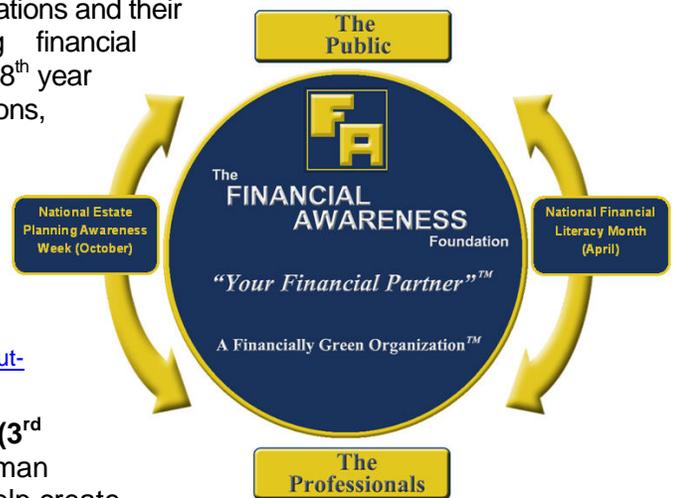
- Make better informed and productive everyday financial decisions
- Save time and money with their financial advisors and service providers
- Have the best opportunities to reach and maintain their personal / family financial dreams
- Enjoy a financially secure debt free future
- Advance their legacy.

Core Values:

1. **Public Service** – Serve as a nonpolitical “financial awareness advocate” to the general public providing them with the essentials principles of smart personal financial management so they can make better every day financial decisions throughout their lives.
2. **Knowledge** – Encourage and support financial education to improve financial awareness and financial literacy.
3. **Collaboration** – Recognize, promote, and unite the lead financial service and nonprofit associations/organizations that are championing improving financial awareness and financial literacy with other associations, organizations, nonprofits, educational institutions, companies, firms, and individual efforts.
4. **Diversity** – Promote cultural diversity within the financial services professions to better serve a diversified public.
5. **Ethics** – Encourage ethical behavior within financial service professions, nonprofits, and the business world.

Focus: The Financial Awareness Foundation has two main focal points that 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 in the 8th year of 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)**

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

- **National Estate Planning Awareness Week (3rd week in October)** (We worked with Congressman Thompson’s Office during 2007 and 2008 to help create

- this proclamation, and have helped to advance and promote it since.)

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

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 also working to:

- Deliver friendly public biannual reminders / polite nudges to get / keep their finances in order
- Educate the public regarding the benefits of the multi-disciplinary team approach for financial and estate planning
- Assist the public in locating appropriate professionals for their unique situation
- Motivate the public to take proper action by visiting their financial professionals to improve their and their families financial and estate planning situations
- Benefit nonprofits through new potential planned giving opportunities from a better informed public and financial advisors
- Participate in educational conferences, seminars, forums, and meetings regarding improving financial awareness and financial literacy

We are hard at work to become the ‘foundation of choice’ for improving financial awareness and financial literacy.



The Financial Awareness Foundation Leadership and Board of Directors:



Valentino Sabuco, CFP[®], AEP[®], Executive Director & Publisher
Executive Director & Publisher of The Financial Awareness Foundation
Sonoma County, California
www.thefinancialawarenessfoundation.org/pdf/Sabuco-TFAF-Intro.pdf



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We Have A Serious Problem that Requires Immediate Attention

With so many people on the 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 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 literacy 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, does not have a current or up-to-date estate plan to protect themselves and their family's assets; that could be half your family, friends, and associates.
- Too many young people and their families are burdened with excessive education 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.

Many 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

There is a real solution to this lack of financial awareness and financial literacy epidemic that revolves around educating the general public, professionals, and nonprofits to the essential principles to smart personal financial management and motivating them to take appropriate actions. People need access to better personal financial management tools and information to communicate and work more effectively with their financial advisors and to make better informed and productive everyday money decisions.

The Foundation is in a unique position to significantly help improve the public's and professional's financial awareness and financial literacy by serving as a nonpolitical and neutral "financial awareness advocate" for the public, the professionals and their associations, educational institutions, and the nonprofits. We have two major 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 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
 - **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.
www.TheFinancialAwarenessFoundation.org/pdf/About-NationalFinancialLiteracyMonth.pdf
2. Furthermore, we are developing and assembling educational content for the general public while we assist the financial service and nonprofit organizations and professionals, employers, and academia to provide high-quality, financial education and cost-effective services to the public.

The Financial Awareness Foundation along with professional associations such as: the American Institute of Certified Public Accountants, the American Association 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 Partnership for Philanthropic Planning, the Financial Planning Association®, and The International Association of Advisors in Philanthropy have supported National Financial Literacy Month and National Estate Planning Awareness Week.

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 associations, can mobilize the financial and estate planning and nonprofit communities by providing support, tools, and education for the professionals and the public they serve.



You can 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

The Master Plan and How Everyone Benefits

Supporting improving financial awareness and financial literacy is a winning opportunity for all. As leaders in the financial and estate planning industries, we have first-hand experience with the successes and challenges Americans face and want to help. 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 and estate plan is an important financial responsibility not only to themselves but to their families, loved ones, and their philanthropy.
- Inform and educate the general public, in an entertaining format, to the essential principles of smart personal financial management.
- Motivate the general public to take action to get and keep their financial house in order with up-to-date estate and financial 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

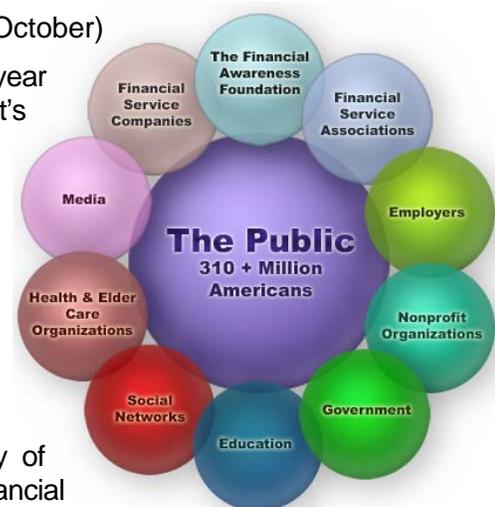
The strategy is to touch the majority of the general public and financial service and nonprofit professionals at least twice a year with a growing concentrated personal finance content media blitz through the strategic venues of:

- National Financial Literacy Month (NFLM - April)
- National Estate Planning Awareness Week (NEPAW - 3rd Week in October)

We understand that this is a massive undertaking. As we move into the 8th year of the **Improving Financial Awareness & Financial Literacy Movement** it's being accomplished through leading organizations 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

This is supplemented throughout the year with the develop and delivery of exceptional educational content and tools to the general public and to financial service and nonprofit professionals and their organizations, and educational institutions that support the general public's financial and estate planning and charitable planning needs.



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 healthy, 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 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.
- Philanthropists benefit 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.

Together we have the potential to help solve a major social challenge by advancing and contributing to one of the most broad-based, multifaceted moments for improving financial awareness and financial literacy while advancing philanthropy.



Ways to Participate in Financial Awareness Movement & Campaigns

You can play an integral role by supporting and participating in helping to build semiannual financial awareness programs during April and October. Together we have the potential to advance and contribute to this broad-based, multifaceted movement for improving financial awareness and financial literacy.

Here are some fun and easy ways to participate:

1. Place financial and planning editorial content on your website, newsletters, social networks, and media advertising 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>



Here's a link to download the Foundation graphic

<http://www.thefinancialawarenessfoundation.org/pdf/FA-FL-Graphic.jpg>

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

<http://www.thefinancialawarenessfoundation.org/pdf/Co-brand-FA-FL-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. Host and present a 'general public' and a 'professional' national webinar built around built around personal financial and estate planning during the months of April and October. We have scripted public presentations that can be easily customized and branded that are entitled
 - "Building Blocks to Successful Financial Planning"
 - "Building Blocks to Successful Estate Planning"

A version of the **"Building Blocks to Successful Estate Planning"** presentation and slides and attendee gift can be seen and downloaded at www.stelter.com/webinars.html. This was presented as a national live recorded webinar for The Stelter Company's nonprofit community during National Estate Planning Awareness Week, and again for the Almond Board of CA executives and staff as an in house employee benefit program, and with the American Endowment Foundation for National Estate Planning Awareness Week. We can work with you



to do something like this for your organization.

http://aefonline.actonsoftware.com/acton/rif/9733/s-046a-1510/-/l-sf-rpt-00016000007Tbm7-090d:35b/l-sf-rpt-00016000007Tbm7-090d/showPreparedMessage?utm_medium=email&utm_source=Act-On+Software&utm_content=email&utm_campaign=Be%20Better%20at%20Estate%20Planning&utm_term=Click%20here&cm_mc=Act-On%20Software- -email- -Be%20Better%20at%20Estate%20Planning- -Click%20here&sid=iZeoSfCnn

5. Provide local seminars and workshops. Encourage your local

- Financial Planning Association Chapter
- Estate Planning Council
- Partnership in Philanthropic Planning Council
- 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.

6. 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.

7. 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

8. Build and schedule your organization's annual marketing, branding, advertising, and social networks around these amazing, broad-based, multifaceted campaigns for improving financial awareness and financial literacy to take full advantage of the concentrated media blitz on your clients, members, and prospects.

9. Circulate financial awareness campaign materials and the Press & Industry Media Kit and Guides to others and encourage them to support and participate in these important events. These can be found under the Campaign tab on www.TheFinancialAwarenessFoundation.org

Along with **The Improving Financial Awareness & Financial Literacy Movement Program Overview / Planner**. This is an excellent overview and planning tool.

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

We hope you will join us in communicating these important opportunities with your colleagues and actively supporting and participating in the Improving Financial Awareness & Financial Literacy Movement & Campaigns built around the strategic venues of **National Financial Literacy Month** and **National Estate Planning Awareness Week**.



The Foundation's High Priority Campaigns & Programs

The high priority items for The Financial Awareness Foundation revolve around implementing our mission to serve as a nonpolitical "financial awareness advocate" for the general public, financial service and nonprofit professionals and their organizations, educational institutions, employers, and municipalities. Our high priority items include:

1. **Advancing our infrastructure** to serve and touch more of the general public, financial service and nonprofit professionals and their organizations
2. **Expand active participation & support for The Improving Financial Awareness and Financial Literacy Movement & Campaigns** built around the strategic venues of
 - National Financial Literacy Month
 - National Estate Planning Awareness Weekto touch everyone at least twice a year with the essential principles of smart personal financial management.
3. **Launch *The Financial Knowledge Community's*** Public, Professional, and Nonprofit portals
 - Inform and educate the general public, in an entertaining format, to the essential principles of smart financial management.
 - Motivate the public to take action to get and keep their financial house in order
 - Guide the public to find the right professionals to cost effectively implement and update their financial, estate, and their charitable giving plans.
 - Help bring together and educate financial service and nonprofit professionals to better serve their clients, general public and potential donors.
4. **Advance our personal and professional publishing activities**
 - Publications
 - ✓Books & eBooks – we have completed our first 3 publications
 - ✓Feature Articles – we have completed a collection of over 125 feature articles
 - ✓Research Reports and White Papers
 - ✓Specialty materials - Smart Phone Apps, Financial Games, Calendars, Tips & Blogs
 - Educational Programs & Content
 - ✓The Financially Green Organization Certification Program™ for employees
 - ✓The Your financial PARTNER University & College Program™ for graduating students, faculty and staff, and alumni
 - ✓Seminars / Live & On-Demand Webinars – we have two scripted presentations
 - ✓Work with K-12 through college and graduate school education providers to imbed the essential principles of smart personal financial management into curriculums.
 - ✓Work with financial service and nonprofit organizations, employer, membership organizations, and municipalities to provide their employees, members, and residents with the essential principles of smart personal financial management.
 - ✓Continuing Education (CE) for professionals
 - Speakers Bureau
5. **Open *The International Improving Financial Awareness & Financial Literacy Center*** to
 - 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
6. **Launch a major scholarship challenge** to provide the next generation of financial service and nonprofit professionals with the best tools to service the next generation of clients.
7. **Current and ongoing fundraising** to expand and accelerate our efforts.



We are looking for the right philanthropists, grant giving foundations, strategic partnerships and sponsorships, and concerned individuals to assist us. Can you help us?

Capital Campaign

Over 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 of Directors, Advisory 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. Further we are also looking for additional strategic partners, volunteers, donors and supporters to help with our improving financial awareness and financial literacy campaigns and programs.

Do you have any ideas here? Can you help us?

Once properly capitalized, as a 501(c)(3) nonprofit organization The Financial Awareness Foundation anticipates generating sustainable operating resources to implement its programs and financial awareness campaigns, and support team through fees from its publications, apps, and educational content, professional continuing education programs and content, generous grants, sponsorships, donations, and contributions of time, services, intellectual property, and money from the public and supporters, dedicated volunteers, philanthropists, supporting nonprofits, educational institutions, and associated financial service organizations and technology companies that see the importance of our work.

Potential Sources of Revenues: As a 501(c)(3) nonprofit organization, The Financial Awareness Foundation has the opportunity to generate initial capitalization and ongoing operational revenues and funding from the following:

1. Philanthropists
2. Grants from grant giving nonprofits and municipalities
3. Sponsorships
4. Donations from Financial Services Associations, Professionals, and Companies
5. Donations from Nonprofits Associations, Professionals, and Nonprofits
6. Donations from General Public
7. Bequests
8. Planned Giving Programs
9. Financially Green Organizations Certification Programs & Challenges™
10. Publishing
11. Continuing Education for Professionals



We Welcome Your Support In Being Part of the Solution

The Foundation is in a unique position to significantly help improve financial awareness and financial literacy by serving as a nonpolitical “financial awareness advocate” for the general public, financial service and nonprofit professionals and their organizations, educational institutions, employers, and municipalities. We are taking an active leadership role to recognize thought leading organizations and their professionals 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)
- National Estate Planning Awareness Week (3rd week in October)

We also deliver and develop exceptional educational content to the general public and to financial service and nonprofits professionals and their organizations, to educational institutions and employers 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.

We welcome your assistance and support. To learn more about us and our financial awareness campaigns and efforts, and ‘**how you can make a meaningful difference**’ visit us at www.TheFinancialAwarenessFoundation.org and join our new discussion group on [LinkedIn](#).

If you have further ideas or require additional information about us, the improving financial awareness & financial literacy movement, campaigns, programs and activities, or to discuss volunteer activities, sponsorships, planned gifts, and contributions / 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 Significantly

“Improving financial awareness & financial literacy...”SM

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