

The TFAF

Building Blocks to Successful Financial Planning Presentation Series & Curriculum

We have fifteen dynamic and powerful scripted 90-minute PowerPoint presentations, which can be accompanied by the **TFAF - Personal Finance Publication Set**, to provide the viewer with a memorable lifelong learning experience, along with

- ◆ The tools to making lifelong informed financial decisions.
- ◆ A systematic approach better managing their personal finances.

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. They are entitled

#1 - Introduction to

- ◆ **Rethinking Personal Finances - The Building Blocks to Successful Financial Planning Presentation Series** This contains some very important messages why improving financial awareness and financial literacy so VERY important, along with an introduction to the essential principles to smart money management – the foundation to personal finance knowledge. They can be expanded or compacted as required.

#2 & #3 - Building Blocks to Successful Financial Planning

- ◆ Part 1 – Getting Organized
- ◆ Part 2 – The Essential Principles

#4 - Building Blocks to Successful Estate & Gift Planning

#5 - #15 – The Elements

- ◆ In depth training for each of the 11 Elements shown on The FA Infinity Lifelong Learning Symbol

Our presentations aim to improve the viewers financial lifestyle by providing an easy-to-use, systematic approach to personal financial management, introduce the viewer to the secrets of smart money and the **Essential Principles to Smart Personal Money Management** – the foundation to personal finance knowledge. The presentations are designed to provide the viewers with a very important ‘life skills’ most often not taught in home and school, thus **empowering the viewer** to:

- ◆ 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 values, knowledge and assets to future generations, and charitable causes, help end inherited poverty, while making this a better world for all
- ◆ Have the highest probability to reach and maintain their family dreams while living out a financially successful life.



The FINANCIAL AWARENESS Foundation

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

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See How Others Presented TFAF Presentations

Sample Slide-Decks

Here are two sample slide decks from our Presentation #1; **Introduction – The Building Blocks to Successful Financial Planning**. From USC and The International Improving Financial Awareness & Financial Literacy Association (The FA Association) at the University of Ghana for the faculty and staff, and UGBS Community

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

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



The FINANCIAL AWARENESS Foundation

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Here are two sample slide decks from our Presentation #4; from **USC** and from **The International Improving Financial Awareness & Financial Literacy Association (The FA Association)** at the University of Ghana for their Alumni Association



<https://home.thefinancialawarenessfoundation.org/pdf/DraftSlides4of4.TFAF-KLS-Emeriti-BBSEGP.pdf>

https://home.thefinancialawarenessfoundation.org/pdf/TFAF-FAAssocSlides-UGBSAlum-BuildingBlock-EP-4_of4.pdf

Our presentations are designed to be very flexible and can be branded and customized. With appropriate editing adjustments, the **TFAF Presentation Set** can generate several presentation formats and lengths to accommodate different time slots and audiences.

Each presentation can start with a brief opening and closing comments from an organizational dignitary, and a few housekeeping comments from an announcer, with a question and answer (Q & A) session, with closing comments by the Moderator or a presenting host dignitary.

The ideal audiences for these presentations include High School Students and Above

- ◆ Primary or Secondary or College Teachers, Professors, Lecturers and Administrators
- ◆ Graduating Class
- ◆ Alumni Groups
- ◆ Employee Groups
- ◆ Nonprofit organizations
- ◆ Service Clubs
- ◆ Young Professionals
- ◆ Female Groups
- ◆ Male Groups
- ◆ Retirees
- ◆ Soon to be Retirees
- ◆ Municipality and Community Leaders, Politicians, and Law Makers
- ◆ Other Associations & Special Interest Group



These valued presentations and accompanying materials can be used in classrooms, webinars, workshops, community offerings, as group financial planning, that can be recorded and presented on demand, or as part of a radio, television or PBS broadcast. Advanced and more comprehensive versions of these can also be used as training tools for financial service professionals, and financial product providers.

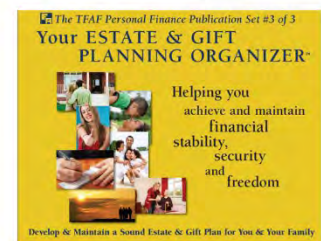
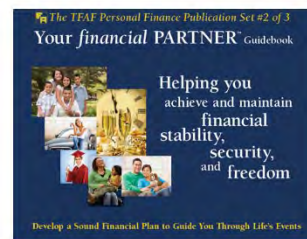
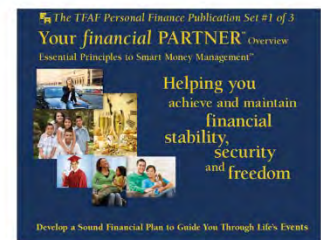
You can use this presentation anytime of the year, along with being offered in support of **The Improving Financial Awareness and Financial Literacy Movement** during the strategic campaign venues celebrating

- ◆ **April being known as Financial Literacy Month**, and six months later as
- ◆ **October being known as Estate & Gift Planning Awareness Month**

These presentations are also designed to use **The Financial Awareness Foundation's** complimentary – **The TFAF - Personal Finance Publication Set** as a syllabus and audience gift takeaway tool, but it is not required.

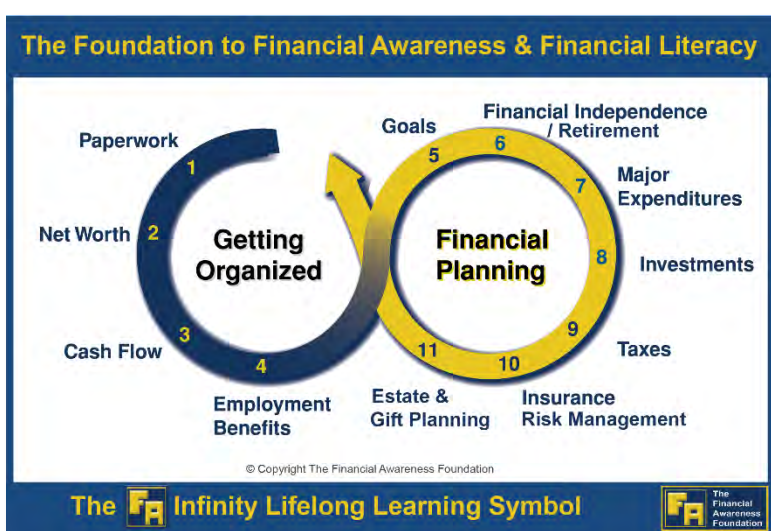
With advanced notice **The Financial Awareness Foundation's** materials can be co-branded with partnering organization's branding and contact information. You can download a complimentary copy by clicking on this link or the graphic of the TFAF- Personal Finance Publication Set.

<https://home.thefinancialawarenessfoundation.org/publications.html>



Further, if you are seeking a comprehensive curriculum you may wish to consider using the actual **Your financial PARTNER Guidebook** and sharing the presentations around this as a 14 Module Series, or expanded or contracted as the scheduling permits. This can also be recorded by a team of local, financial service professionals and viewed on demand; then followed up with live in person / online workshops, or individual coaching / planning sessions with qualified professionals.

As you can see from the following table of contents it follows **The FA Infinity Lifelong Learning Symbol** and elements nicely, providing the viewers with a valuable and often overlooked life skill.



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Should you have any questions or require any additional information, or just want to discuss your situation please contact us.

Stay safe and healthy – there's lots of work to do and fun to be had!!!

Wishing you all the very best,

Valentino

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



The FINANCIAL AWARENESS Foundation