



# The NAEPC EDUCATION FOUNDATION

*“Improving Financial Awareness & Financial Literacy”™*

## Memorandum

**To:** Interested Parties  
**From:** Valentino Sabuco, CFP®, AEP®, Executive Director & Publisher  
**Date:** 02/25/13  
**Re:** **Short Introduction to National Financial Literacy Month (April)**

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The following is a short introduction and call to action to support and participate in a national financial awareness and financial literacy campaign during April as National Financial Literacy Month, and six months later during October, National Estate Planning Awareness Week. The following introduction can be edited as appropriate and posted on your organizational website, social media groups, etc., and as a quick outline for discussing NFLM and NEPAW.

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Please join our distinguished 2013 honorary co-chairpersons Jonathan Blattmachr, Esq., AEP® (Distinguished), recognized as one of the country's most creative trusts and estates lawyers, author and speaker; and Janet Novack, leading financial journalist, exceptional communicator, and the Washington D.C. Bureau Chief & Executive Editor for Forbes, leading financial service associations and organizations, and the press in supporting and participating in April as National Financial Literacy Month and six months later during October, National Estate Planning Awareness Week.

Additional information about The NAEPC Education Foundation estate and financial awareness campaigns, National Financial Literacy Month and National Estate Planning Awareness Week, and to download our media kits please visit

<http://www.EstatePlanningAnswers.org/national-financial-awareness-campaigns/>

The NAEPC Education Foundation and NAEPC have teamed up with 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 Society of Financial Service Professionals, the National Academy of Elder Law Attorneys, the Partnership for Philanthropic Planning (all members of the Synergy Summit, a unified think tank and voice of leadership for leading financial service organizations), the Financial Planning Association®, and the Association of Fundraising Professionals. Together these organizations represent nearly 1,000,000 professionals, and the accountants, attorneys, estate planners, financial planners and advisors, insurance agents and brokers, trust officers, and nonprofit executive directors that are members of these professional associations, and all have the objective to mobilize the estate and financial planning community by providing support, tools, and education for professionals and the public they serve.

**You can help support public and professional financial awareness during National Financial Literacy Month and National Estate Planning Awareness Week** by placing estate and financial planning checklists and editorial content on your website, newsletters, client mailings, social media groups, local newspapers, and radio/television/web based shows. We also encourage participating groups to host or participate in community-wide public and professional programs built around estate and financial planning during the months of April and October.