



Society for Financial Education and Professional Development, Inc.
Enhancing financial and professional growth...

January 9, 2015

Dear Partners, Colleagues and Friends,

The Society for Financial Education and Professional Development is grateful for your support and we look forward to continuing to partner with you to enhance financial education opportunities for more Americans. The New Year gives us time to reflect on our recent accomplishments and areas of growth for the future.

Here are highlights of our work in 2014:

- SFE&PD played a key role in the development of the first *Financial and Economic Literacy in Basic Education Guidebook* published by the Asia-Pacific Economic Cooperation (APEC). The Guidebook demonstrates how to design and implement financial and economic literacy programs in primary and secondary schools for the 21 countries who are members, including the United States. A copy of the guidebook is posted on our website.
- In September, SFE&PD hosted the 7th Annual Financial Literacy Leadership Conference on “*Financial Literacy: Research, Techniques, and Initiatives*,” which included 10 workshops, 2 plenary sessions, and hosting the President’s Advisory Council on Financial Capability Listening Session. Sharon Epperson, CNBC Personal Finance and Senior Commodities Correspondent, and Richard Cordray, Director of the Consumer Financial Protection Bureau, were among many outstanding speakers and panelists who joined us at the conference. We are also pleased to report that our survey responses indicate the conference completely met participant expectations. Conference details are on our website.
- I wrote two articles – “*Financial Literacy Equals Economic Security*” and “*How Does Culture Affect Financial Literacy?*” that were included in Media Planet’s Financial Literacy special publication in the *San Francisco Chronicle* newspaper. These articles draw national attention to importance of financial literacy for all Americans.
- SFE&PD’s financial literacy training program for college students that teaches students to maximize their financial resources after graduation remains a part of our core mission. Last year, we presented seminars at colleges and universities throughout the nation. Based on a survey of students who attended our personal money management seminars/workshops, 96% stated that information presented would help them better manage their finances.
- SFE&PD expanded our reach in communities nationwide by providing more financial literacy training in churches, schools, and other venues. Additionally, we have grown our curriculum development services that will have a nationwide impact on increasing the financial literacy of Americans. We also partnered with Florida A&M University to implement a financial literacy research and evaluation project through a grant provided by the Social Security Administration.
- Jump\$tart Coalition for Personal Financial Literacy honored me with the 2014 William E. Odom Visionary Leadership Award for SFE&PD’s advancement of financial literacy of students.

Exciting new developments are on the horizon for this year, which include partnering with banks and other financial institutions to bring financial literacy seminars to a greater number of communities across the United States; welcoming talented new Board Members with impressive public and private sector expertise to our team; and exploring the feasibility of becoming a membership organization. On behalf of SFE&PD and our staff, I look forward to working with you in the days ahead, and I wish you every success in 2015.

Sincerely,

A handwritten signature in cursive script, appearing to read "Theodore Daniels".

Theodore Daniels
Founder and President
Society for Financial Education and Professional Development, Inc. (SFE&PD)