

# Society for SFEPD Financial Education & Professional Development



## Financial Education Seminars

### About the Organization:

The Society for Financial Education and Professional Development was established in 1998. The primary mission of this non-profit organization is to enhance the level of financial and economic literacy of individuals and households in the United States and promote professional development at the early stages of career development through mid-level management.

### Seminars Offered to Students of Historically Black Colleges and Universities (HBCUs)

**Credit Management** - presented to college freshmen during orientation sessions and first year experience programs. This seminar provides information on the responsible use of credit cards and student loans.

**Personal Money Management** – presented to upperclassmen, particularly seniors, but offered to all levels of the student body. All aspects of personal finance are covered in this seminar.

**Creating Wealth by Investing** – presented to college seniors to help them transition into the workplace. Investment categories and allocations, retirement plans; and investor protection laws and regulations are addressed in this seminar.

### New Seminar Offered:

SFEPD developed a new seminar, **“Creating Wealth through Homeownership.”** This seminar was offered to upperclassmen for the first time during the spring 2008 semester. The seminar is designed to help students prepare for and achieve homeownership.

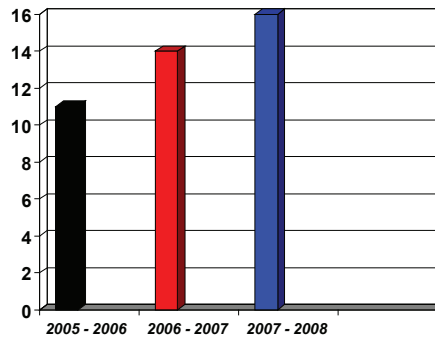
### Major Goal of Seminars:

The seminars are designed to expose individuals to the fundamentals, strategies and the intricacies of personal financial management that they may not get elsewhere (or learn too late). Through these seminars students are gaining a better understanding of personal financial management and other economic topics as well as practical uses of financial management strategies and economic skills in everyday life.

### Audience:

Financial Education seminars were presented to over 16,000 students during the 2007-2008 academic school year. There were 50 “Credit Management”, 82 “Personal Money Management”, 7 “Creating Wealth by Investing” and 8 “Creating Wealth through Homeownership” seminars presented.

Thousands

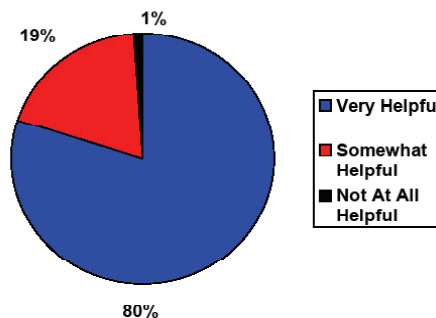


### Program Evaluation

#### “YourFutureCounts” Financial Education Seminars:

Based on student evaluation forms submitted, 80% found the “Credit Management” seminar very helpful, while 87% found the “Personal Money Management” seminar very helpful. 97% stated that the “Credit Management” would help them better manage their personal finances; while 98% stated that the “Personal Money Management” seminar would help them better manage their finances in the future.

Overall, How Would You Rate The Credit Management Seminar?



**Testimonials:** “We really appreciate your organization’s efforts to empower students with the information they need to make positive financial choices.” **Professor Tiombe Jones, Tuskegee University.**

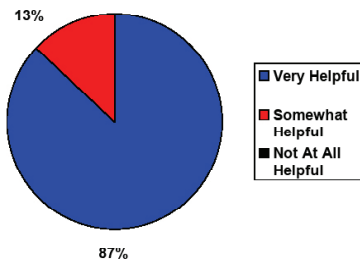
“It was a perfect addition to our Business Week activities. The verbal feedback that I solicited from students today assures me that the seminar was informative, helpful, and enjoyable. Mr. Dywane Hall is a great Presenter. He made the material accessible and fun for our younger undergraduates; he made the material interesting and personally relevant for our upperclassmen. I was particularly impressed by the variety and number of real life examples that emphasized the role of risk and the need for timely decision-making for financial security. The up-to-date news articles also made a big impact. We are looking forward to another seminar from your team next year.” **Dr. Kim Marie Coleman, Dillard University.**

“This is to express our appreciation for another year of successful financial management education to our students, staff and faculty. The lessons you taught while well received in the past has now become a clarion call for financial sanity by all our constituents. Thank you for patiently answering every question and for breaking down information where the ‘average Joe’ could understand it.” **Dr. Igwe E. Udeh, Southern University at New Orleans.**

“Thanks for a dynamite presentation! Your information was right on point and well received.” **Dr. Dennis Kimbro, Clark-Atlanta University.**



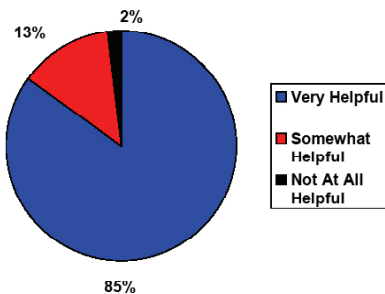
Overall, How Would You Rate The Personal Money Management Seminar?



**Creating Wealth by Investing Seminars:**

Based on student evaluation forms submitted, 85% found the “Creating Wealth by Investing” seminar very helpful. 98% stated that they would make investments in the future.

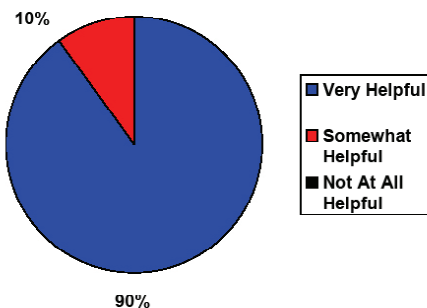
Overall, How Would You Rate The Creating Wealth by Investing Seminar?



**Creating Wealth through Homeownership Seminars:**

Based on student evaluation forms submitted, 90% found the “Creating Wealth through Homeownership” seminar very helpful. 99% stated that the information presented would help them in the process of purchasing a home.

Overall, How Would You Rate The Wealth through Homeownership Seminar?



**Academic Enhancement Scholarships:**

With the support from a private donor, SFEPD has awarded \$28,500 in scholarships to students of HBCUs. The purpose of these scholarships is to provide financial assistance to students pursuing an undergraduate degree in the fields of business, accounting, finance, economics and marketing. The scholarships are used to cover the costs of books, school materials, technology equipment, and fees for attending personal improvement programs, e.g. an etiquette seminar, and the purchase of wardrobe items for first job upon graduation from college. The awards are intended to enhance a student’s academic and professional development.

**Partnership and Sponsorships:**

“YourFutureCounts” financial education seminars are presented in partnership with HSBC-North America.

“Creating Wealth by Investing” seminar is supported by the Citigroup Foundation and the Ariel Mutual Fund Group.

“Creating Wealth by Homeownership” seminar is presented in partnership with HomeFree USA, Inc. (U.S. Department of Housing and Urban Development).

**Recognition:**

Theodore R. Daniels, Founder and President of the Society for Financial Education and Professional Development was appointed to serve on the newly established President George W. Bush’s Advisory Council on Financial Literacy. He is also a member of the Certified Financial Planners Board of Standards Board of Directors.

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**Participating HBCUs:**

- Alabama A&M University
- Albany State University
- Alcorn State University
- Arkansas Baptist College
- Benedict College
- Bennett College
- Bethune-Cookman University
- Bowie State University
- Central State University
- Cheyney University of Pennsylvania
- Clafin University
- Clark-Atlanta University
- Coppin State University
- Delaware State University
- Dillard University
- Edward Waters College
- Elizabeth City State University
- Fisk University
- Florida A&M University
- Florida Memorial University
- Fort Valley State University
- Grambling State University
- Hampton University
- Harris-Stowe State University
- Howard University
- J.F. Drake State Technical College
- Jackson State University
- Jarvis Christian College
- Johnson C. Smith University
- Kentucky State University
- Langston University
- LeMoyné Owen College
- Lincoln University
- Livingstone College
- Miles College
- Mississippi Valley State University
- Morehouse College
- Morgan State University
- Norfolk State University
- North Carolina A&T University
- North Carolina Central University
- Oakwood University
- Paine College
- Philander Smith College
- Prairie View A&M University
- Rust College
- Saint Augustine College
- Savannah State University
- Shaw University
- Southern University at Baton Rouge
- Southern University at New Orleans
- South Carolina State University
- Spelman College
- St. Augustine’s College
- St. Paul’s College
- Stillman College
- Talladega College
- Tennessee State University
- Texas Southern University
- Tougaloo College
- Tuskegee University
- University of Arkansas at Pine Bluff
- University of Maryland-Eastern Shore
- University of the District of Columbia
- Virginia State University
- Virginia Union University
- Voorhees College
- Winston-Salem State University
- Xavier University of Louisiana

Other Participating Universities:  
 University of Michigan