



SOCIETY FOR FINANCIAL EDUCATION
& PROFESSIONAL DEVELOPMENT



Teach. Inspire. Advocate.

Impact Report

2023

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Our Story

ABOUT US

For 25 years, the Society for Financial Education and Professional Development (SFEPD), based in the Washington, D.C. area, has served as a financial literacy and professional development nonprofit. We teach financial skills to people of all ages and backgrounds with a focus on underserved communities and HBCU college students.

The Society for Financial Education and Professional Development, Inc. (SFEPD) is an award-winning, national leader in the financial literacy field. Established in 1998, SFEPD is one of the first educational nonprofits to teach individuals how to grow their wealth and achieve economic prosperity.

SFEPD is the brainchild of Theodore "Ted" Daniels. Daniels realized that Americans, especially communities of color and first-generation college students, did not have access to the financial knowledge needed to successfully manage their finances. To change this, Daniels started SFEPD to teach financial management skills to individuals, with a special focus on Historically Black Colleges and University (HBCUs) students.

OUR MISSION

Our mission is to enhance financial and economic literacy and to promote the professional development of individuals in underserved communities.



"Our goal at SFEPD is to provide individuals with the financial knowledge and skills needed to maximize their financial resources and build wealth."

Theodore R. Daniels
Founder & President, SFEPD

Quarterly Talks with Ted

Quarterly Talks with Ted are online webinars with SFEPPD president and founder Ted Daniels with industry experts in the financial and education sectors discussing today's most relevant topics.

This series provides educational opportunities and engagement for SFEPPD's constituents throughout the year. SFEPPD hosts industry experts for these one-hour talks to dive into the issues affecting our current financial and economic landscape.



Financial Security: Today & Tomorrow featured Angela Antonelli, Research Professor and Executive Director, Georgetown University Center for Retirement Initiatives, and Kendra Kosko Isaacson, Pensions Policy Director and Senior Tax Counsel for Senator Patty Murray.



The Cost of Financial Illiteracy featured Vince Shorb, Founder & CEO of the National Financial Educators Council.



Diversity, Equity, and Inclusion in the Financial Markets featured SEC Commissioner Jaime Lizárraga.



Medicare & Credit featured Rod Griffin, Senior Director of Consumer Education and Advocacy for Experian.

"I will admit that I knew hardly anything about the Secure 2.0 Act and its implications on retirement savings. Thank you so much for hosting these great speakers!"

"Very insightful discussion about the continuing wealth disparity in America and the importance of educating the minority population on the financial market and how to build wealth. The format of the talks is excellent for introducing and reinforcing points of discussion."

SFEPD Academy Financial Literacy Camp

The SFEPD Academy was a weeklong virtual experience for high school students to learn about financial literacy and professional development. Students expanded their horizons by working as part of a team in group challenges with others across the country to increase not only their financial know-how but also to strengthen their communication, leadership, team building, professional development and marketing skills, and more!

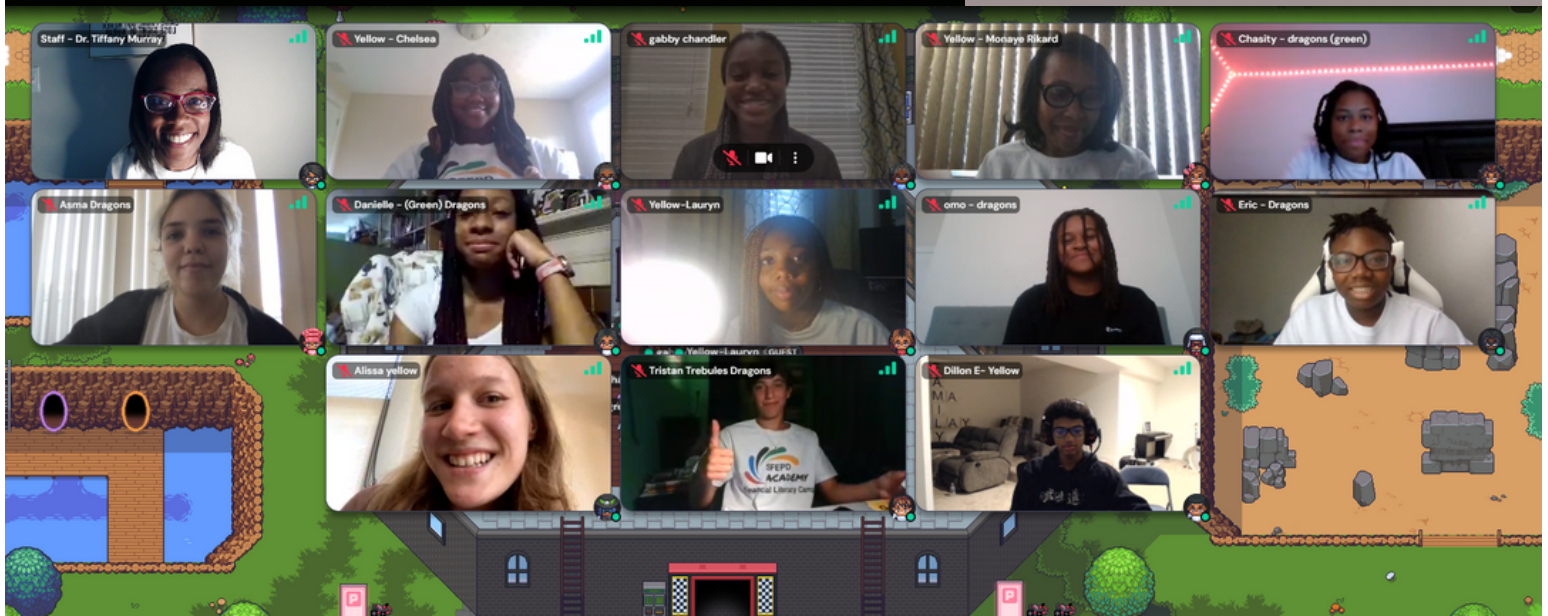
5

Different
States

"The whole program was organized really well, and the challenges were really fun. I don't know how, but this program has made me feel so productive and it made me feel like more of a leader. This whole week, I've been happier and more assertive, so, thank you for that. This program made me feel like I could run for a leadership position in my school's SGA this upcoming school year!"

11

Different
High Schools



SFEPD Academy Financial Literacy Camp

Individual Competition



Chelsea L. - Indiana
1st Place



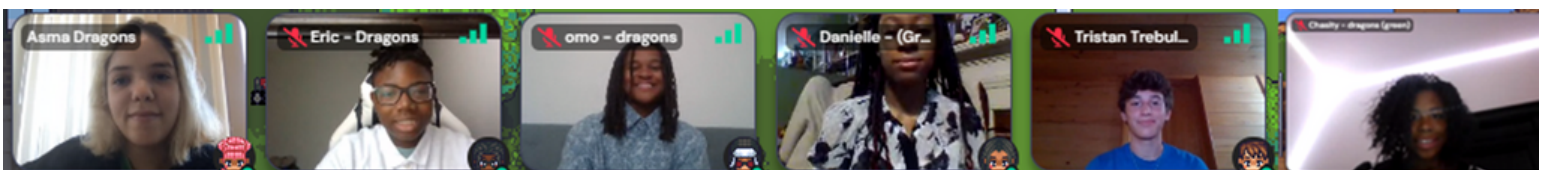
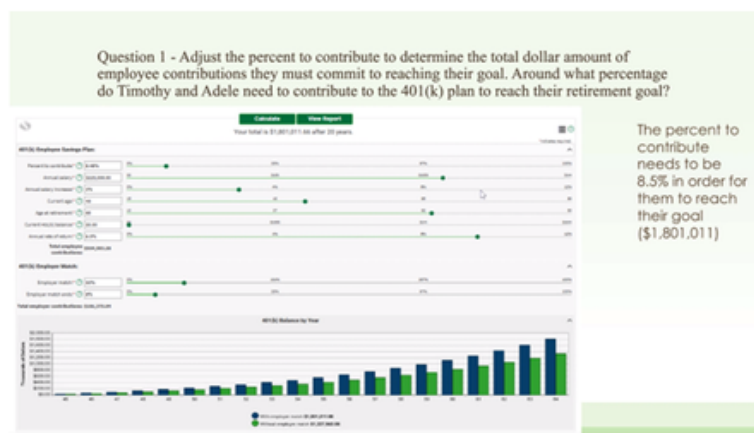
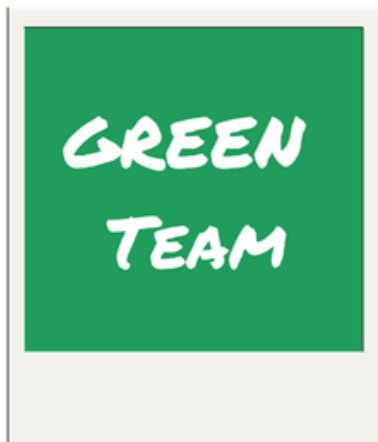
Omo F. - North Carolina
2nd Place



Dillon E. - Maryland
3rd Place

"When I first started this academy at SFEPD, I didn't know much about financial literacy in general, however this academy has helped me learn how to save money, budget it, plan for college and so much more. I have learned to be financially intelligent, build my credit and plan for retirement for the future, which I probably would have never learned to do without attending!"

Team Competition – 1st Place



Annual Conference

SFEPD's 15th Annual Financial Literacy Leadership Conference, held in 2023, brought together leading experts and professionals from the financial industry to explore the multifaceted aspects of financial literacy and its impact on achieving financial wellness. Against the backdrop of the Gaylord National Resort in National Harbor, Maryland, the event aimed to delve into strategies that promote agility and sustainability in the dynamic landscape of financial literacy.

The first evening featured a gala celebration in honor of SFEPD's 25th Anniversary. A special dinner and awards presentation marked this milestone, offering a time for reflection on the organization's achievements and contributions to financial literacy over the past quarter-century.



FINANCIAL WELLNESS: AGILITY & SUSTAINABILITY

15TH ANNUAL FINANCIAL LITERACY LEADERSHIP CONFERENCE

OCTOBER 23-24, 2023

DIAMOND

amazon

HBCU FINANCIAL LITERACY BOWL

NEFE

SILVER

ally
do it right.

**WELLS
FARGO**

BANK OF AMERICA

BRONZE

COMCAST

experian.

FICO

ICI INVESTMENT COMPANY INSTITUTE
EDUCATION FOUNDATION

Capital One

ADDITIONAL SUPPORT
CARVER BANK

Informent

SFEPD
SOCIETY FOR FINANCIAL EDUCATION
& PROFESSIONAL DEVELOPMENT

Annual Conference



*"I absolutely enjoyed everything about the conference that I experienced. It was **STELLAR!** This conference was one of the **BEST** conferences that I have attended. The workshops were phenomenal. All of the nuggets and invaluable information I received will be shared amongst my peers, family, friends, colleagues, and the community. I gained even more knowledge on the broad component of financial literacy which has helped me to focus on a major for the next level of my educational journey."*



"An excellent conference that was inclusive, informative, and interactive. I picked up many nuggets to take back to my organization on the tremendous work you are doing at SFE PD. Kudos and shout out to your team for hosting an outstanding conference."



"Everything was great... great sessions, great exhibitors, kind attendees... really among the best conferences I've been to."

Annual Conference



"The opportunity to connect with like-minded professionals centered around the work that we do. The mission of the organization is also in alignment with my values. I like the format of the panel with individuals from various backgrounds. I also love that the student ambassadors participate and that college students attend. The conference is large enough to be effective yet small enough to be intimate. I am always so energized after attending."



"I loved the interaction with both young and seasoned attendees. It was excellent witnessing the enthusiasm of all involved in the financial field. Most refreshing was the engagement of the young people of color and their passion for the financial industry overall."



"It was great meeting people from so many different kinds of financial education sectors. It gave me a greater appreciation on all the different ways we can educate and impact our community."

25th Anniversary Celebration

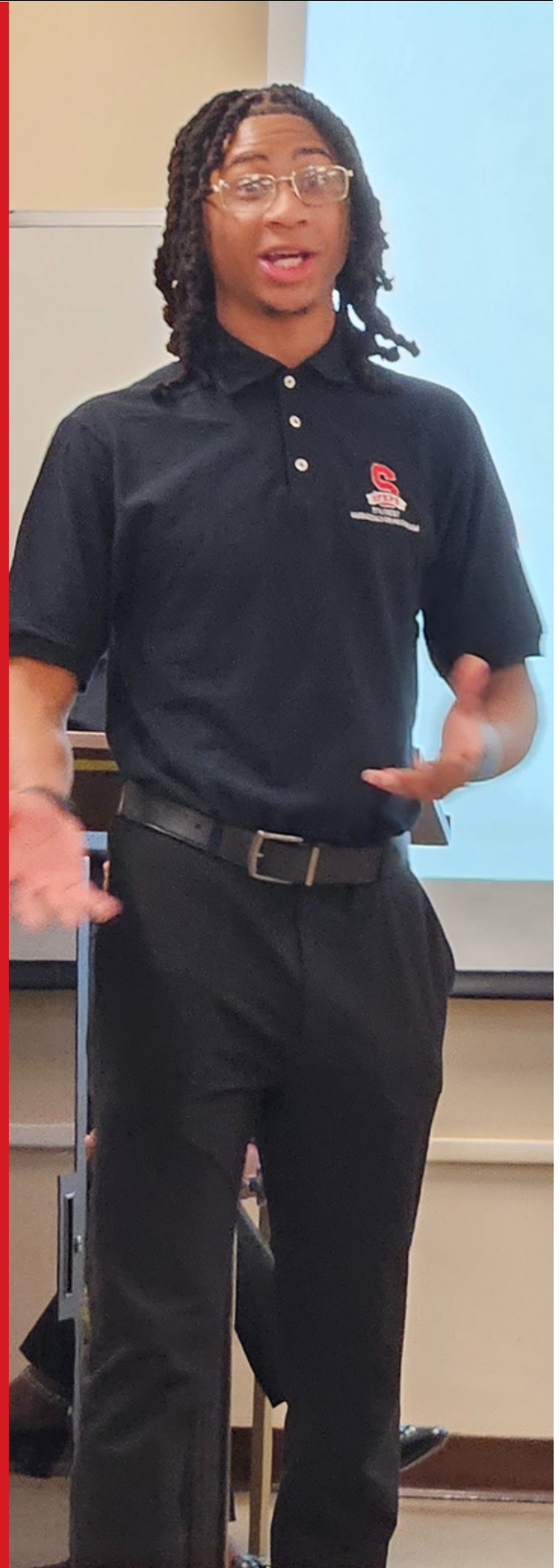


Student Ambassador Program

In 2017, SFE PD started the Student Ambassador Program to train college students to teach their peers about financial education. The program is designed for students at Historically Black Colleges and Universities (HBCUs), many of whom are first-generation, to help them manage their finances better and build wealth.

SFE PD trains Student Ambassadors in personal finance concepts to enable them to lead and teach engaging classes to fellow students. HBCU business school professors and SFE PD's financial educators mentor the ambassadors and help them to create innovative workshops and presentations. In this way, the students develop leadership skills and act as champions of financial literacy on their college campuses.

Student Ambassadors coordinate educational events, teach financial classes and develop programs to reach their peers. Financial workshops include saving, investing, banking, budgeting, credit, debt, student loan management, and financial goal-setting. Through this unique learning initiative, college students gain financial knowledge and skills that give them a foundation for economic success.



1

New Campus

35

HBCU Campuses
Represented

179

Total Student
Ambassadors

222

Financial Education
Presentations

5,207

Individuals Reached

Top Student Ambassador Programs



SFEPD Top Student Ambassador
Program Award
Florida A&M University



SFEPD Top Student Ambassador
Program Award
Tuskegee University

Student Ambassador Program



Hampton University



University of the District of Columbia



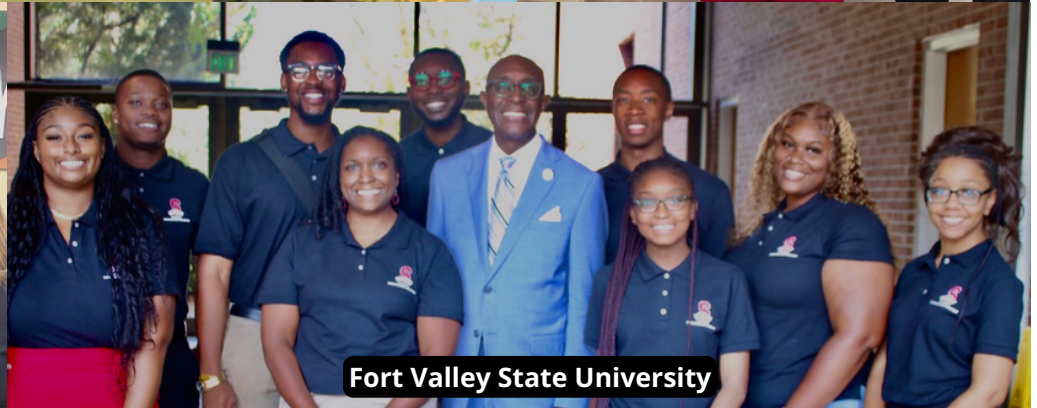
Talladega College



North Carolina A&T State University



Florida A&M University



Fort Valley State University

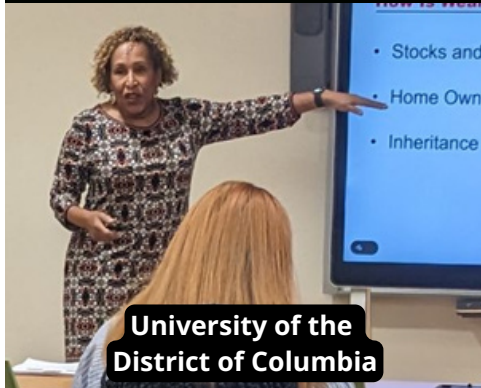


Alabama A&M University



Johnson C. Smith University

Mind Over Money Skills Seminars



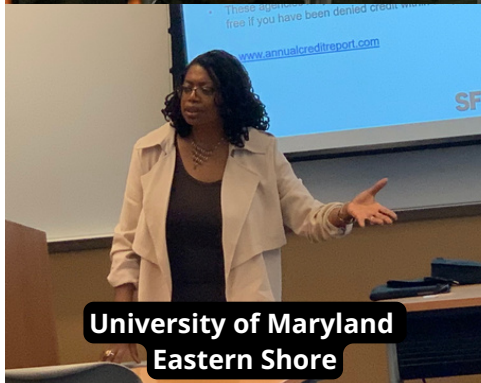
University of the
District of Columbia



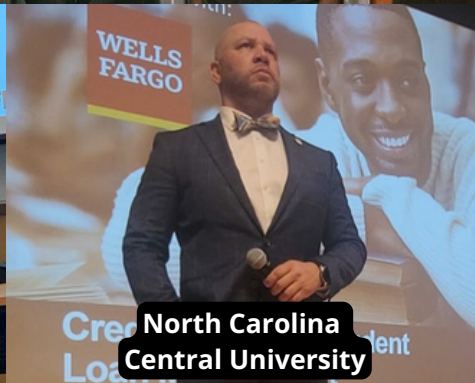
Hampton University



Livingstone College



University of Maryland
Eastern Shore



North Carolina
Central University

72

Financial Education
Presentations

12,529

HBCU Students
Reached

SFE PD teaches college students personal financial management seminars that lead to economic success. Students are introduced to personal finance concepts and learn practical financial strategies and tools to use in everyday life. This critical knowledge helps students make informed decisions about spending, saving, investing, credit, debt, and financial planning goals. Our experienced seminar presenters – experts in the financial planning field – teach interactive, student-centered sessions. More than 500,000 students at 90 colleges and universities, primarily at 70 HBCUs, have learned personal management skills from SFE PD.

SFEPD Out & About



**Jump\$tart Coalition for
Personal Financial Literacy
Partners Meeting and
Awards Luncheon**



**Jackson State University's
2023 Financial Wellness Center
Summer Camp**



**National Historically Black
Colleges & Universities (HBCUs)
Week Conference**



**SFEPD & Investment Company Institute (ICI)
Visit to Tuskegee University**



**SFEPD Student Ambassadors from Tennessee State University
Visit to Jackson**



**Financial Literacy Day
on Capitol Hill**



**Blacks In Government (BIG)
2023 National Training Institute**



**Jump\$tart
National Educators Conference**

Spotlight: HBCU Financial Literacy Bowl



In what quickly became a conference favorite, SFEPD launched a new event for 2023. Initially open to all 36 SFEPD Student Ambassador programs, teams from each participating HBCU compete in a two-phased competition to see who is the most financially savvy. The students competed based on what they learned about financial literacy through the Student Ambassador Program, which trains college leaders to teach their peers about personal finance.

The first round of the competition was held virtually. The top three HBCU teams, with four students from each school, competed in a final-round live competition on October 24 at SFEPD's 15th Annual Financial Literacy Conference at the National Harbor in Maryland. **Hampton University** won first prize, **Tuskegee University** won second, and **Southern University and A&M College** won third. The winners received monetary awards and bragging rights.

Students were quizzed on topics ranging from budgeting and credit to investing and loan management. "SFEPD teaches HBCU students financial skills that encourage economic success," said Ted Daniels, president and founder of the educational nonprofit. "SFEPD's Financial Literacy Bowl served as an interactive and engaging platform to increase college students' financial knowledge and savviness."

The HBCU Financial Literacy Bowl was sponsored by The National Endowment of Financial Education (NEFE). "The bowl would not been possible without NEFE's collaborative support," Daniels said. "NEFE was a terrific partner in helping SFEPD launch its first college bowl at SFEPD's annual conference attended by over 200 educators and financial experts."

SFEPD works directly in partnership with an oversight professor at each HBCU participating in the Student Ambassador Program. Dr. Sylvia Rose, Assistant Dean and Assistant Professor of Finance at Hampton University's James T. George School of Business, was instrumental in preparing her students for the college bowl.

"As the Oversight Professor, I had an extraordinary and fulfilling experience working with our Ambassadors and coaching them in their efforts to succeed at the HBCU Financial Literacy Bowl," Rose said. "The students did the heavy lifting; I just guided them in strategy. It is very rewarding to be a part of this financial literacy movement and observe the growth of our students. Partnering with SFEPD has provided our Hampton students and the campus community with invaluable life learning experiences and knowledge."

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Hampton University Student Ambassador Paige Loague was an enthusiastic participant. "Our Student Ambassadors competed in the first HBCU Financial Literacy Bowl and placed first!" she said. "I am immensely proud of my team's hard work and dedication, demonstrating our growing financial knowledge and our commitment to fostering financial literacy." Donte Douse, another Hampton University Student Ambassador, agreed. "I truly enjoyed being a part of SFEPD's Financial Literacy Bowl – it was a great way to increase my financial literacy knowledge." Reina Oliver and Kayla Gibson completed the team of the four Hampton University Student Ambassadors.

The HBCU Financial Literacy Bowl allowed Student Ambassadors to sharpen their financial expertise and skills while attending a national financial educational conference in the Washington, D.C. area. Loague said that SFEPD's conference provided students with a rich platform for learning and networking with working professionals and Student Ambassadors from other HBCUs, all of whom share a passion for advancing financial literacy.

Hosting the financial literacy bowl at SFEPD's annual conference served as a creative learning tool to engage college students on their level and give them opportunities to enhance their professionalism and build financial confidence," Daniels said. "SFEPD is proud to be a national leader teaching college students useful money management strategies."



SFEPD
HBCU
Financial
Literacy
BOWL
Presented by
NEFE

Our Partners

Financial education provides a critical foundation for economic success. That is why SFEPD is on a mission to ensure that Americans have access to the knowledge and skills necessary to improve their financial destinies.

SFEPD often partners with universities/colleges, financial institutions, educational nonprofits, civic groups, and government agencies to lead innovative programs to increase financial and economic literacy in communities nationwide.



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