

SFE&PD

Society for Financial Education & Professional Development, Inc.

Enhancing Financial and Professional Growth...

FACTS AT A GLANCE ACADEMIC SCHOOL YEAR 2009-2010



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Financial Education Seminars

About the Organization

The Society for Financial Education and Professional Development, Inc. (SFE&PD) is a non-profit 501(c)(3) organization, established in 1998. SFE&PD is a leading financial education organization whose mission 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.

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 gain a better understanding of personal financial management and other economic topics as well as practical uses of financial management concepts, strategies and economic skills for everyday life.

Credit Management

Designed for incoming freshmen. Students learn the responsibilities associated with establishing credit and how to make informed decisions about spending. This one-hour workshop includes the latest information about credit cards, student loans and credit scores. More importantly, it conveys the impact of students' current credit decisions on future employment and wealth accumulation.



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Seminars Offered to College & University Students.

Personal Money Management

Geared toward upperclassmen. Up to two hours long, this seminar focuses on how to leverage a college degree for the benefit of personal financial

growth. This seminar covers all aspects of personal money management such as credit management, establishing financial goals, budgeting, saving, investing, risk management (insurance) and other important financial subjects to help students prepare for their future years (homeownership, retirement planning, estate planning).

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.

Creating Wealth through Homeownership

Presented to upperclassmen, particularly seniors. This seminar is designed to help students prepare for and achieve homeownership and lifelong financial empowerment.

Testimonials:

"The lives of our students have been deeply enriched by the interaction with SFE&PD. We have had the opportunity to select from the array of seminars to tailor the presentations to the specific exposure and maturity levels of students in different classifications. This selection process allows us to make the presentations relevant to where the students are in their development and preparation for transition to the workplace. It also provides the students with the opportunity to discover, question and develop a better understanding of financial matters that are so critical to their future success and stability of their families. Working with the team at SFE&PD has been an honor and a privilege!"

Jacquelynn K. Davis
Clark Atlanta University
School of Business Administration

"Thank you for another outstanding Society for Financial Education and Personal Development (SFE&PD) Personal Money Management Seminar at Central State University. Mr. Marcus Creighton was well received by our attendees. The lengthy Q&A session was testimony to the interest he generated. We are looking forward to the next time you can visit and continue to share some of the many facets of this subject with our students and faculty."

Henry Tucker
Assistant Professor
College of Business and Industry
Central State University

I want to thank you and your highly professional leadership for giving Miles College students opportunity to learn and practice money management skills. For the last several years you have provided money management educational material and human resources to our students. Your seminars and workshop have helped Miles College students receive training in credit management, budgeting, saving, investing, critical skills needed for personal and professional development. Miles Business Division faculty and students are very appreciative of your active involvement in our students' learning. Miles college students and faculty are very appreciative of your educational seminars. We want a strong partnership with your program and are looking forward to your next visit."

Dr. Mohammad Syed
Professor of Business
Miles College Birmingham, AL

The financial education program on Credit Management at Fisk University made a great impact on the student body. Many students were unaware of the intricacies involved with credit cards, credit scores, or even gaining credit, and the seminar touched on these points as well as many more. Personally, from the seminar I have been able to assess my credit and develop a plan to help myself eliminate debt that was accumulated during my college matriculation. The seminar as well as the presentation speaker provided key tips and advice to help me with my goal and to this day I have used what I learned to successfully start eliminating my debt."

Jamilah Riddick
Fisk University 2010 Graduate

Participating Participating Colleges & Universities

- Alabama A&M University
- Alabama State University
- Albany State University
- Alcorn State University
- Arkansas Baptist College
- Bethune-Cookman University
- Bowie State University
- Central State University
- Cheyney University of Pennsylvania
- Chicago State University
- Clafin University
- Clark-Atlanta University
- Coppin State University
- Delaware State University
- Dillard University
- Edward Waters College
- Fisk University
- Florida A&M University
- Florida Memorial University
- Fort Valley State University
- Grambling State University
- Hampton University
- Harris-Stowe State University
- Howard University (School of Business)
- Howard University (School of Communications)
- Huston-Tillotson University
- J.F. Drake State Technical College
- Jackson State University
- Jarvis Christian College
- Kentucky State University
- Langston University
- LeMoyne-Owen College
- Lincoln University
- Livingstone College
- Miles College
- Mississippi Valley State University
- Morehouse University
- Morgan State University
- Norfolk State University
- North Carolina A&T University
- North Carolina Central University
- Oakwood University
- Paine College
- Prairie View A&M University
- Rust College
- Savannah State University
- Shaw University
- Sojourner Douglass College
- South Carolina State University
- Southern University at Baton Rouge
- Southern University at New Orleans
- Spelman College
- St. Augustine's College
- St. Paul's College
- St. Philip's College
- Stillman College
- Talladega College
- Tennessee State University
- Texas Southern University
- Tuskegee University
- University of Arkansas at Pine Bluff
- University of Maryland Eastern Shore
- Virginia State University
- Virginia Union University
- Voorhees College
- Washington University
- West Virginia State University
- Winston-Salem State University
- Xavier University

Other Venues

- Emerging Leadership Workshop
- NAAAHP Conference

National Black MBA Association's Annual Conference



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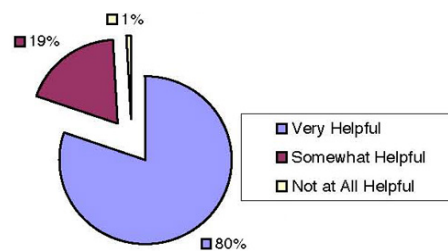
Program Evaluation



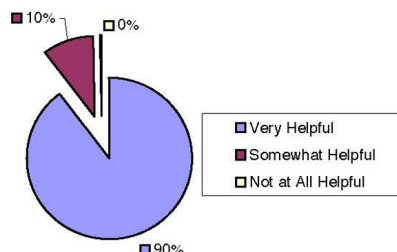
YourFutureCounts Financial Education Seminars

Based on student evaluation forms submitted, 80% found the "Credit Management" seminar very helpful, while 90% found the "Personal Money Management" seminar very helpful. 97% stated that the "Credit Management" seminar would help them better manage their personal finances; while 99% 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?



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



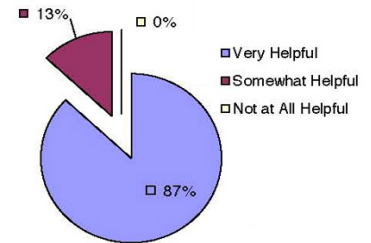
Audience

Over the past 10 years, SFEPD has provided personal financial education seminars/workshops to over 90,000 college and university students. Financial Education seminars were presented to over 15,000 students during the 2009-2010 academic school year.

Creating Wealth by Investing Seminars

Based on student evaluation forms submitted, 87% 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?



Partnerships:

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

"Creating Wealth by Investing" seminar is presented in partnership with E*Trade Financial.

Other Partnerships:

- Ally Financial
- Financial Services Roundtable
- The Greater Washington JumpStart
- The JumpStart Coalition for Personal Literacy

Recognition:

On December 9, 2009, Society for Financial Education and Professional Development, Inc. (SFEPD) was selected as a recipient of the Federal Deposit Insurance Corporation (FDIC) Chairman's Award for Excellence and Innovation in Financial Education for the Atlanta Region.



Theodore R. Daniels with the Chairman of the U.S. Federal Deposit Insurance Corporation (FDIC), Shelia Bair

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