

**Together We Can Nurture
Economic Empowerment
Through Financial
Education in Communities
Across the Country**



Help Us Reach Every Corner of America with Financial Education Programming



We Reciprocate by Providing You with Activation Options that Connect You with Our Audience and Address Many of Your Core Business Objectives



Reach and Influence Potential Clients & Partners

Whether you want to connect with individuals or organizations, we offer custom solutions to connect with prospects that align with your target markets.



Enhance Social Impact Brand Attributes & Build Brand Equity

Personalized campaigns to align your brand with the financial wellness cause and awareness campaigns that highlight your leadership of economic empowerment initiatives.



Increase Awareness & Engagement with Your Business

Tailored advertising, promotions, and experiences built around cause-based marketing provide your organization with greater awareness of your social impact and overall business.



Integrate Financial Wellness into Your Prospect & Client Experience

To maximize benefits and ensure a cohesive and authentic brand experience, we give you resources you can share with your network, prospects, and clients.

NFEC

Uniquely Positioned to Support Our Partners

Since 2006, the NFEC has been serving individuals and organizations who feel passionate about empowering their communities through financial education. We help financial service providers, financial educators and coaches, and content creators make a bigger difference in the lives of the people they serve.

While many in the financial education industry just ask for donations for a cause – the NFEC provides measurable value to our partners that help them meet their core business objectives. This approach has propelled us to our status as a leading financial wellness company in terms of education, materials, quality & breadth, media & online presence, and advocacy.

We have served leading personal finance influencers, top 10 universities, and several clients from the top 20 (in revenue) banking, financial service, and insurance sectors. Additionally, we have trained over 100,000 individuals through our training programs for financial educators and coaches and have more than 6,000 current clients in Certification programs.



An IACET Accredited education company that can issue CEUs



Set the standards for educators & learners that guide the financial literacy industry.



A Certified B Corporation that meets the highest standards for social impact.

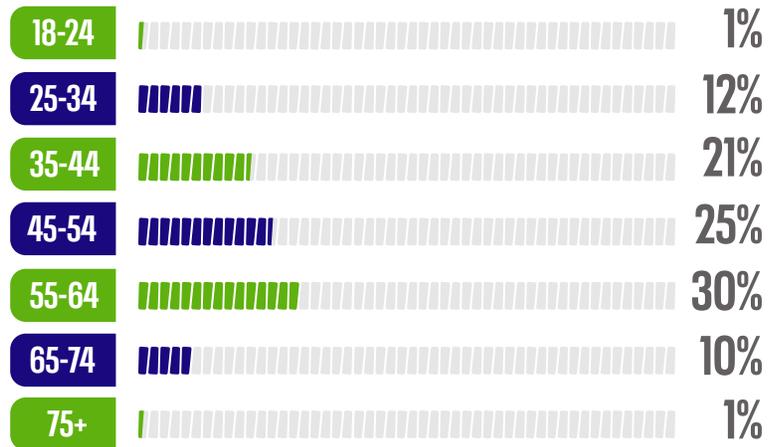
Our Audience

Our audience, organization partners, and team of Certified educators and coaches reach every state across the US and can be geographically targeted at the state level. Our audience identifies as educators, advocates, and industry professionals from diverse backgrounds and industries that all share a common goal – economic empowerment through financial education.



Our Audience: Personal Characteristics & General Interests

Age: ¹



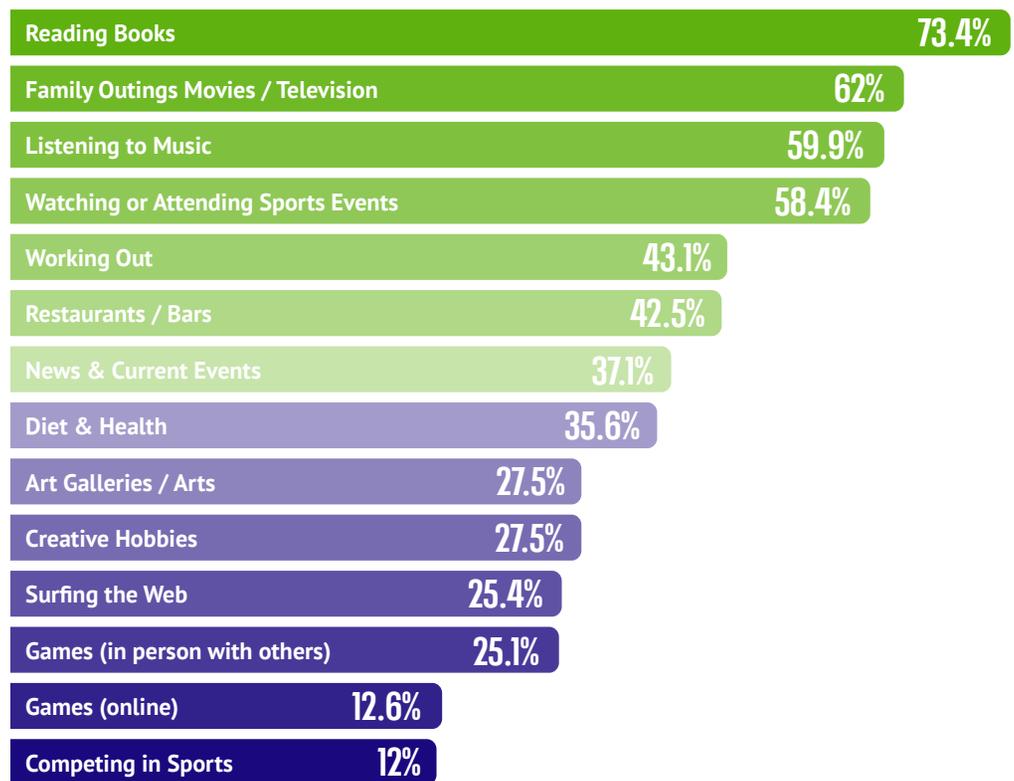
Gender: ²



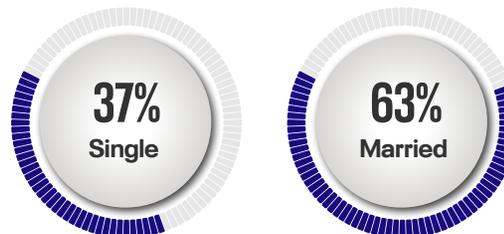
College: ³



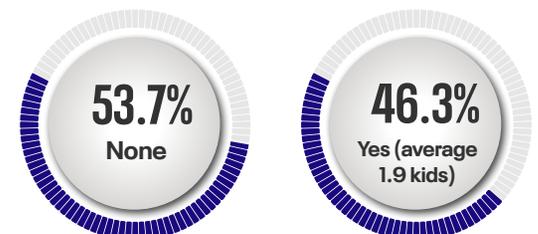
Hobbies



Marital Status: ¹



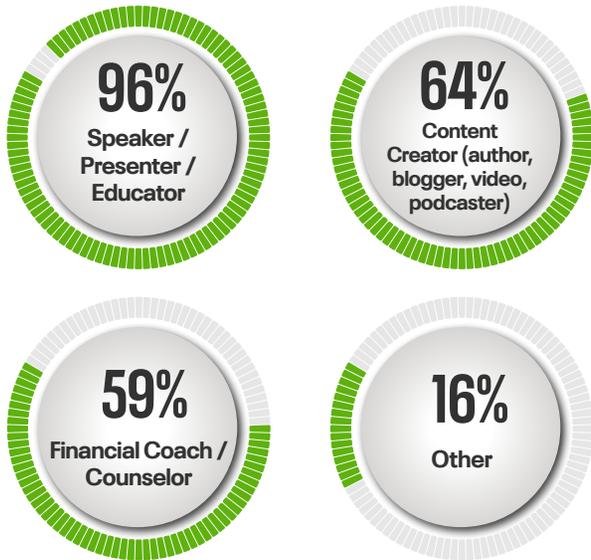
Children (under 18) Living at Home: ¹



Our Audience: Financial Education Involvement ¹

The NFEC attracts individuals who feel passionate about teaching others about money and promoting financial literacy. Our audience members actively participate in multiple roles and are involved in promoting the economic empowerment agenda in a variety of ways.

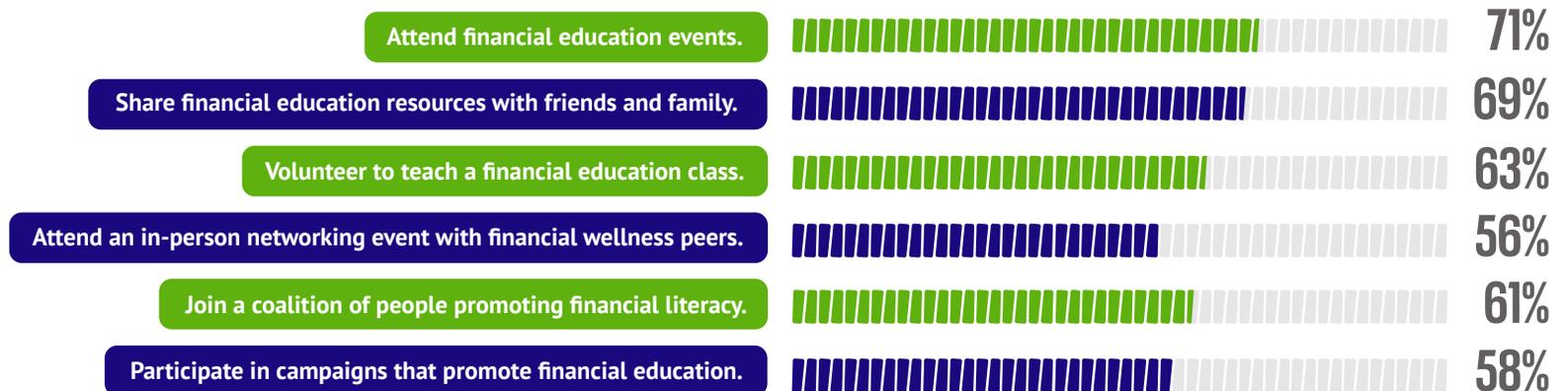
Responses to: 'Do you identify with any of these roles?': ¹



Responses to 'Campaigns that you would support or participate in': ¹

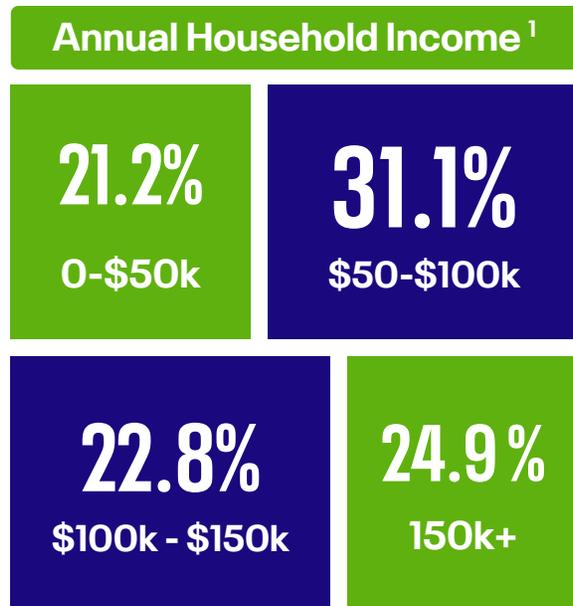


Responses to 'In what types of activities would you consider participating?': ¹

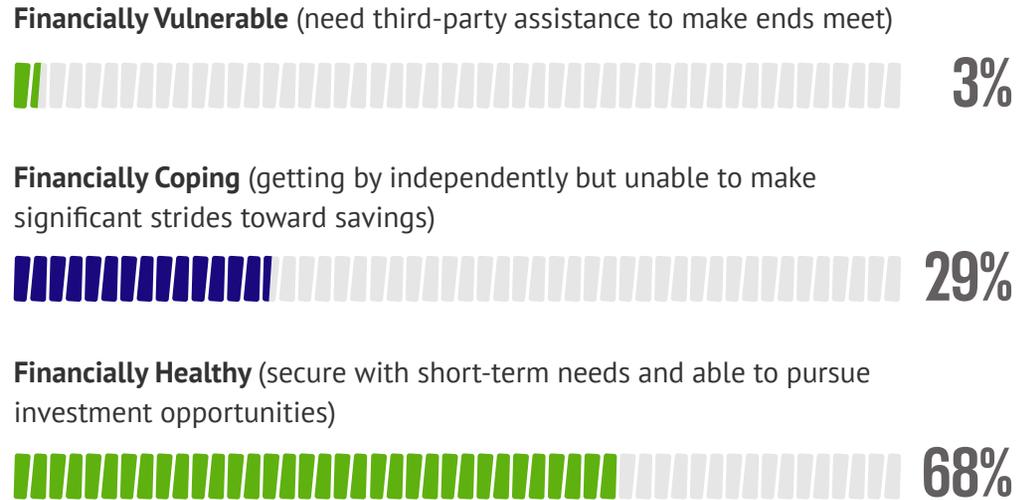


Our Audience: Socioeconomics

We serve individuals from all socioeconomic levels, but our audience members tend to be homeowners who consider themselves financially healthy. They have higher-than-average earnings, with the majority falling in the top 25% of American wage earners.⁴



Description of Current Financial Situation¹



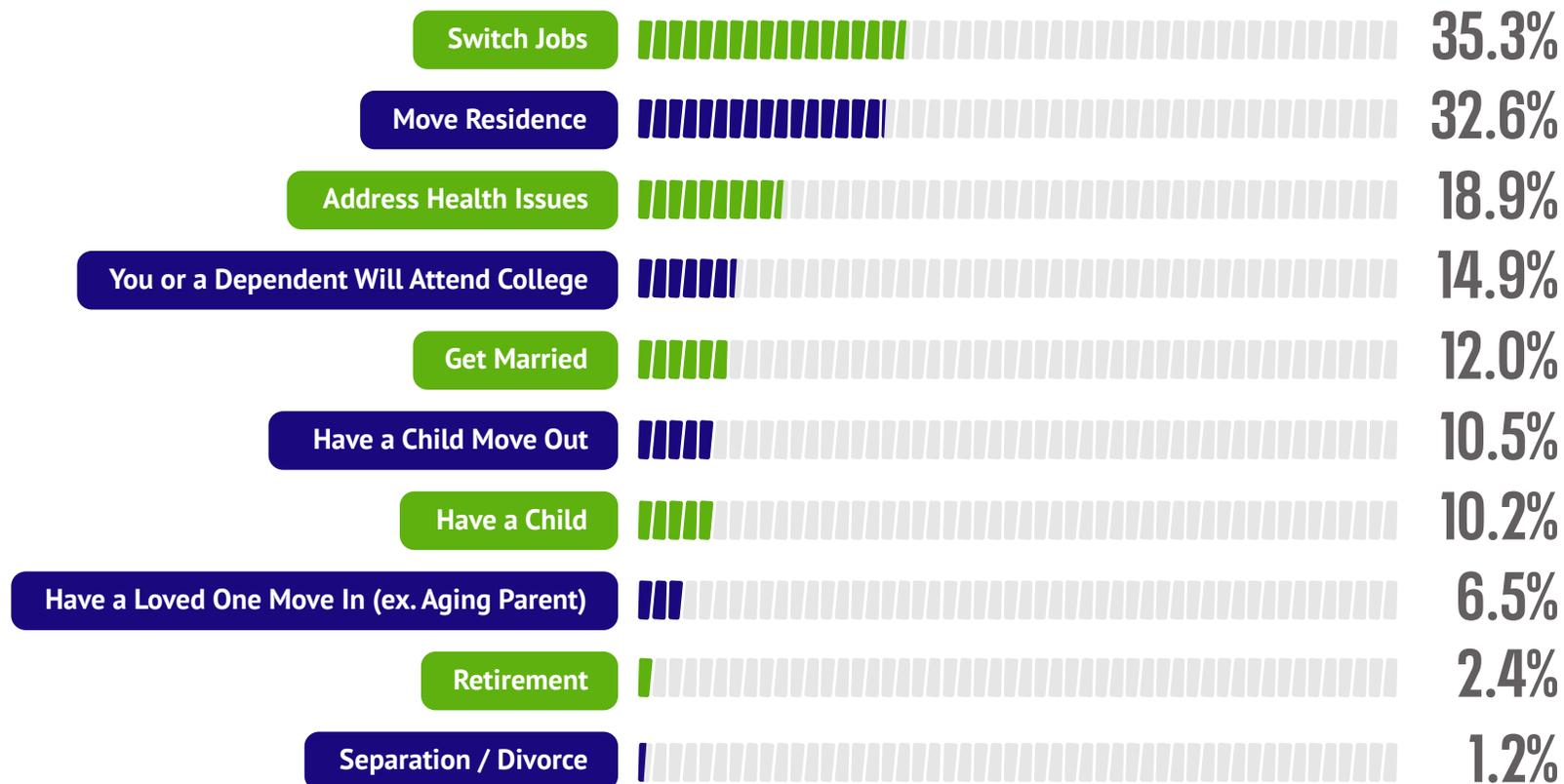
Homeownership:¹



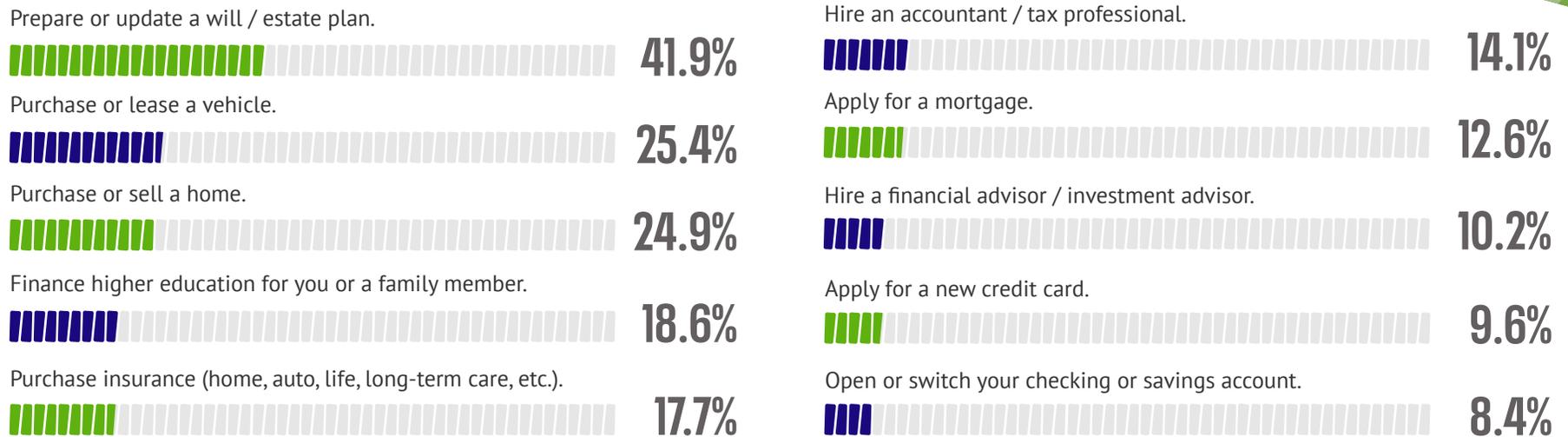
Our Audience: Upcoming Life Events & Planned Purchases

Our contacts are active in managing their own finances and over one-third are looking to switch jobs. Almost one-third plan to move within the next three years, with almost one-quarter seeking to purchase or sell a home. Currently they are most actively searching for financial planning services, followed closely by career services.

Responses to 'What financial life events do you anticipate over the next 3 years?':¹



Responses to 'Select the options you plan to complete in the next 18 months': ¹



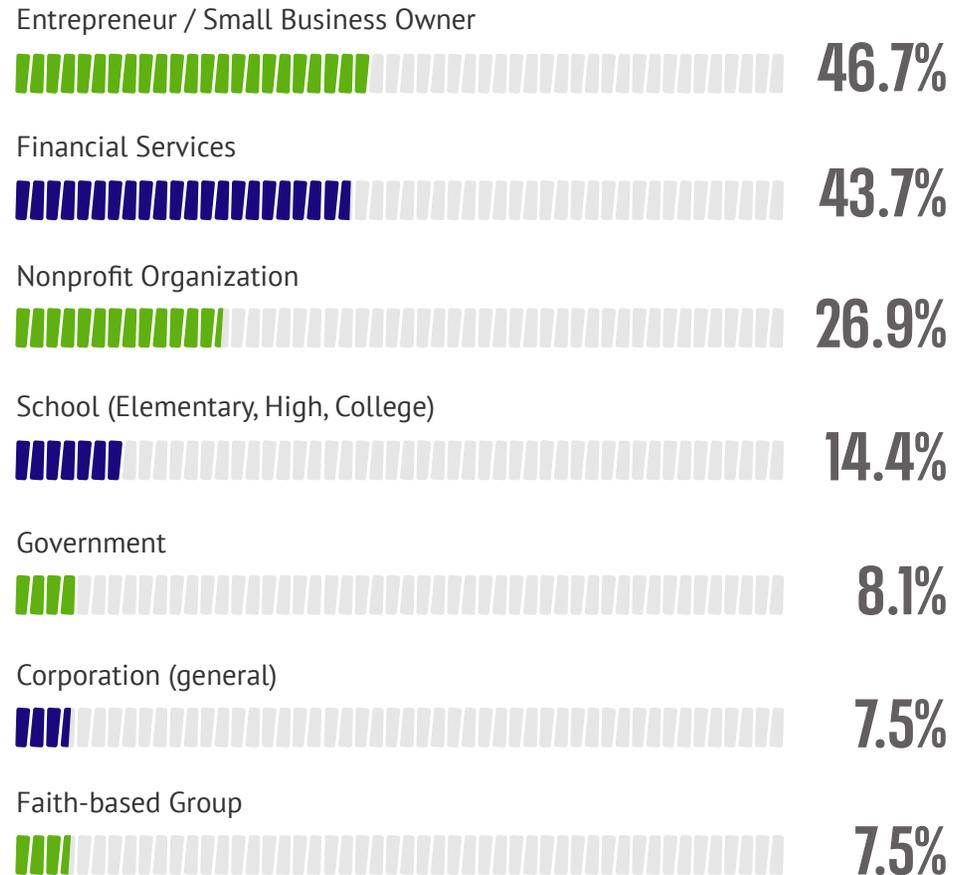
Our Audience is actively searching for these services: ⁵



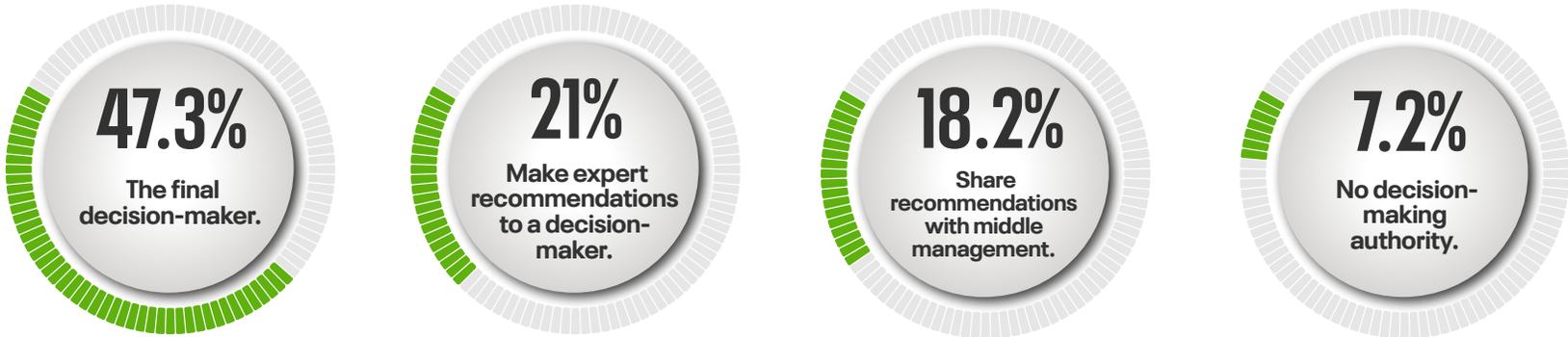
Our Audience: Workplace, Decision-making, & Job Changes

Our visitors and clients come from diverse industries, and most are involved in multiple professions. In meetings with our prospects and clients, we learned that many are looking to incorporate financial education into their current industry; but many are seeking ways to shift more time toward their passion for teaching personal finance.

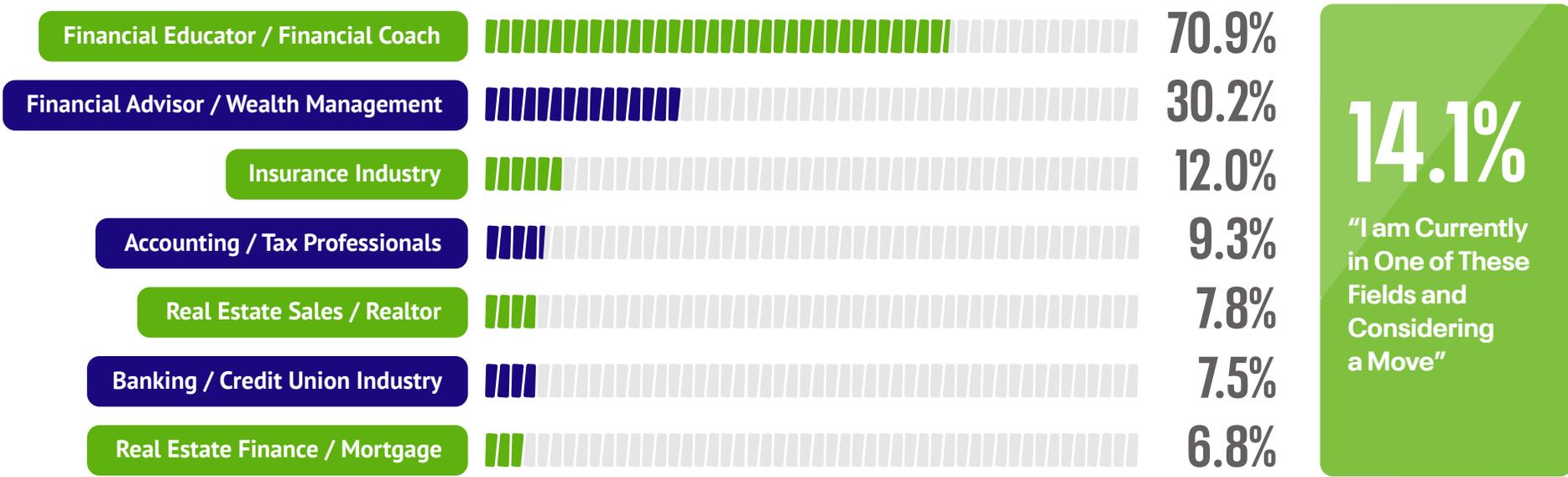
Current Industry or Profession:



Decision-making Authority:



Responses to 'Are you considering working in any of these industries?':



Our Audience: Avatars

Dan R. – Financial Advisor

Personally:

Dan is a 55-year-old man who is a college graduate and currently married with 2 kids under 18 years old. Dan enjoys family outings, keeping up on news and current events, and working out.

Professionally:

He works as a Financial Advisor and is a decision-maker at his company. Part of his role includes giving financial education presentations and Dan wants to increase this activity. He plans to stay with his current firm.

Financially:

Dan considers himself financially healthy (secure with short-term needs and able to pursue investment opportunities), owns a home, and makes over \$250k annually. Within the next 18 months, he plans to update his estate plan, finance higher education for a family member, and maybe sell his current residence and buy a new home.

Lupe G – Teacher

Personally:

Lupe is a 46-year-old woman with a college degree. She is married with 1 child under 18 years old who will be moving to go to college next year. Lupe enjoys movies and television, family outings, and reading books.

Professionally:

She is a high school teacher who shares recommendations with middle management. She also volunteers to teach personal finance through her local library. She is open to opportunities to reach more people with financial education and is actively trying to get this education adopted in her school.

Financially:

Lupe's household income is \$140,000. She considers herself financially healthy (secure with short-term needs and able to pursue investment opportunities) and owns her home. Within the next 18 months, she plans to purchase or lease a vehicle, change her insurance plans, and finance her oldest child's higher education.

Sarah D. – Entrepreneur/Small Business

Personally:

Sarah is a 37-year-old woman with a college degree. She is currently single with no children under 18. She enjoys reading books, listening to music, and going to restaurants and bars.

Professionally:

She started a business centered around her personal finances. She hosts a podcast, creates content, teaches financial literacy, and offers coaching services. As the decision-maker for her company, Sarah is open to opportunities in the finance space and is considering entering into financial services.

Financially:

Sarah considers herself financially coping (getting by independently but unable to make significant strides toward savings), made \$72k last year, and currently rents her home. Within the next 18 months, she plans to buy a home, hire an accountant, and create a will.

Denise B. – Nonprofit

Personally:

Denise is a 59-year-old woman who is married with no children under 18 years old. She doesn't have a college degree but has taken professional development classes. She enjoys creative hobbies, working out, and family activities.

Professionally:

She is a program director for a local nonprofit who makes expert recommendations to the decision-maker. She also has a financial blog and creates video content, as a hobby for now but is seeking ways to monetize her work. She is open to opportunities in the financial education or services sector as an additional source of income.

Financially:

Denise's household income is \$110,000. She considers herself financially healthy (secure with short-term needs and able to pursue investment opportunities) and owns her home. Within the next 18 months, she plans to hire a financial advisor, purchase insurance, and buy or lease a vehicle.



NFEC

Digital and Media
Presence

NFEC's Digital, Social, & Database Presence

Website

54k+

Monthly
Page Views ⁶

55

Website
Authority Score ⁷

Google Organic
Rankings



374

keywords on the
first page ⁸

Social

47,900

Followers

Social from **254** users ⁹



Social Breakdown



YouTube

23,000

Instagram

2,900

Facebook

5,900

LinkedIn

(NFEC & CEO) **12,000**

Twitter

4,100

Email

63k+

Email List
Size ¹⁰



31%

Email Open Rate ¹⁰

Media & Partners

Partners & Clients

Our partners and clients provide local reach and partnership opportunities to help you reach your geographic target markets.

- Nationwide Network of NFEC Trained Educators & Coaches in Every State
- Access to Top Personal Finance Influencers Who Earned NFEC Certifications
- Reach 44 Communities Across the US with the TBL Professional Basketball League Partnership
- Over 2,300 Organization Clients for Expanded Partnership Opportunities

Digital & Print Media

NFEC Brand Media Mentions

1,660

NFEC Certification Holder Mentions

1,242

Television Media Features





**Solutions Offered,
Activation Ideas, &
Case Studies**

Everything We Do is Custom

To maximize your sponsorship budget, we don't use stock packages or just slap your logo in random places. All campaign opportunities are customized to your needs and desired outcomes. We develop and execute activation opportunities designed to engage your target audience in meaningful ways. Here are some potential ways we can support your efforts:



Brand Enhancement Opportunities

- Company, Team, & Personal Branding
- Cause-based Messaging Alignment
- Thought Leadership & Expert Positioning



Market Leadership

- Category & Geographic Exclusivity Options
- Social Impact & Corporate Social Responsibility
- Naming & Logo Placement Opportunities



Interactions

- Creative & Experiential Activations
- Presentation Opportunities
- Employee & Team Engagement



Marketing & Promotions

- Marketing & Advertising
- Connections to Our Audience
- Publicity, Digital Placements, & PR



Case Studies & Activation Ideas

These are just examples of our prior work. Activations are customized to meet your specific needs and reach your desired audience.

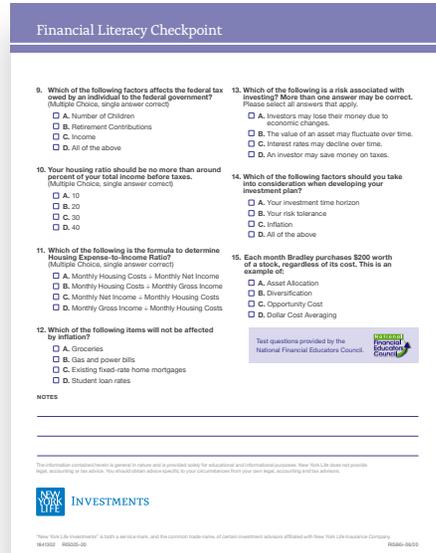
Financial Literacy Test Activation: Case Study

Financial Literacy Tests

With over 151,000 test takers, one of the largest testing banks in the industry, and top organic positioning on Google searches – the NFEC’s tests provide custom opportunities to connect with your target audience.

Case Study Custom Tests & Quizzes: New York Life

New York Life partnered with the National Financial Educators Council to distribute tests to their advisors as part of their Women & Investing program and promoted internally. The agents in turn shared this with their client’s to better understand their client’s needs and current level of financial knowledge.



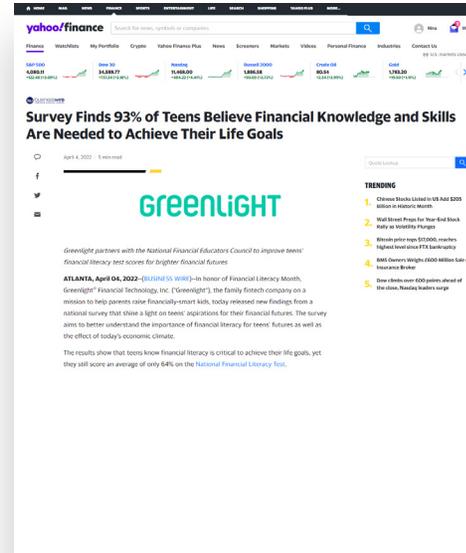
Market Targeted

-  Female
-  Socio-economic: High Net Worth
-  Age: 45 - 74
-  Existing Clients



Case Study Custom Tests & Quizzes: Greenlight

Greenlight partnered with the NFEC and leveraged their national financial literacy test to better understand the knowledge of youth that used their education app. A customized education training map was built to address the 7 core areas covered in the test. Over 1,200 youth participated in the test and promotions received positive media coverage in national and trade publications.



Market Targeted

-  Mixed
-  Socio-economic: Building Financial Foundation
-  Age: 15 - 24
-  Existing Clients

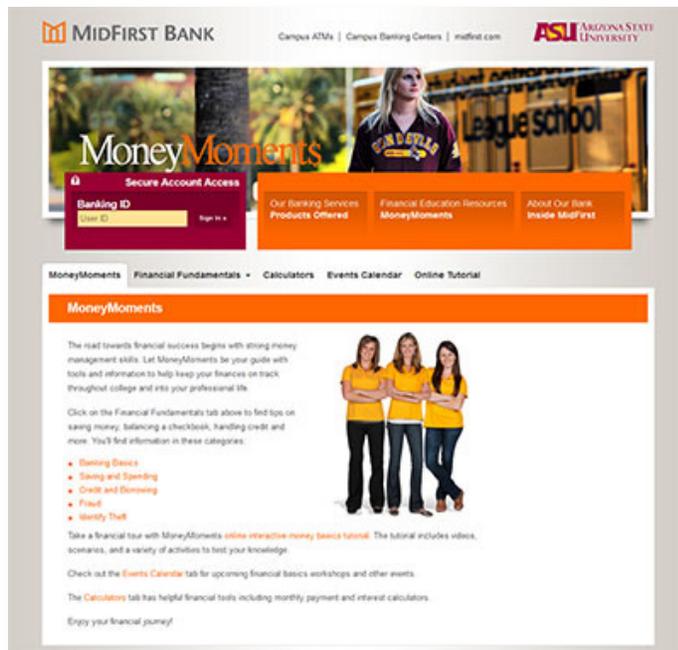


Financial Educator Development Activation: Case Study

Connect with those who will be teaching personal finance through our financial education instructor training. Recognized as the leading training for financial educators and the only one offered by an Accredited provider, we have trained more than 6,000 clients and over 90,000 have taken our micro-courses. Examples of customized opportunities:

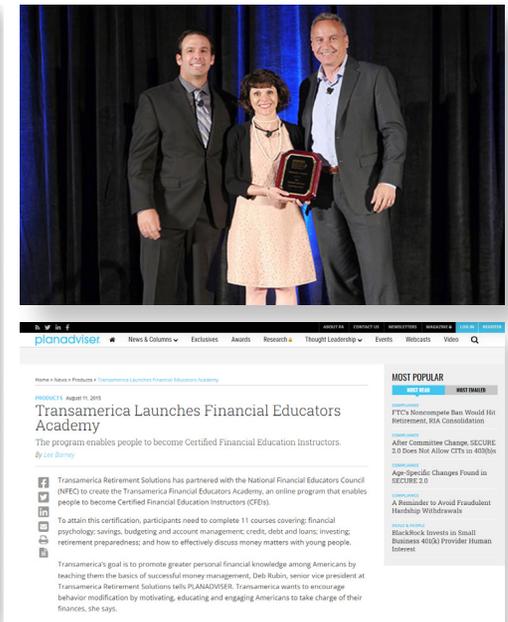
MidFirst Bank / Arizona State University

The NFEC developed a custom peer-to-peer financial education training for MidFirst Bank to deploy across Arizona State University. ASU students were trained and certified to deliver the NFEC-created customized workshops for students across campus.



Transamerica / Aegon

Transamerica enlisted the NFEC's support to develop the Transamerica Financial Educators Academy. Custom Certified Financial Education Instructor training was provided to over 500 financial advisors who used materials and promotions created by the NFEC for their in-house and independent advisors. Launched live events, press campaigns, internal marketing, and awards presented to their executive team.



Financial Education Awards Activation: Case Study

Our industry recognition awards launched in 2014 and have recognized 750 individuals from 47 states for their service on Financial Educators Day (last Friday in April). From among this group, one person annually is selected as a leader in the financial education space and presented with the Financial Education Instructor of the Year Award.



DreamCatcher Wealth Management

DreamCatcher founder Stan Webb wanted to enhance his leadership in the financial education space across Kansas. He partnered with the NFEC to recognize 18 educators to receive the Financial Educators Day award. This recognition was integrated with his financial education programming and covered by the Wichita

Eagle News and the Wichita City Council. The awards opened up opportunities to deliver presentations to multiple organizations, schools, and agencies.



Financial Education Instructor of the Year



Bola Sokunbi is a Certified Financial Education Instructor (CFEI), 4x bestselling author, founder of Clever Girl Finance, and recipient of the 2021 Financial Education Instructor of the Year (FEIY) Award.

Celebrity Collaboration Activation Case Study

Since its inception, the NFEC has created unique activations with over 50 celebrity supporters who participated in live events and produced multimedia content that promotes financial wellness.

Jeanne D'Arc Credit Union & Lowell High School

This NFEC celebrity speaker event reached more than a thousand high school students. The event received positive media coverage, with several million impressions coming from a 4.5-minute feature on the Yahoo Sports 'Outside the Game' production.



US Bank Grand Junction & Coalition of Other Sponsors

The NFEC-led financial event generated several million impressions via television, radio, and print. Top stars shared their personal finance stories and live bands and dance crews provided entertainment to keep the energy high. Additional sponsors included Wells Fargo, State Farm, Channel 11 News, Cumulus Broadcasting, Channel 8 News, and the City of Grand Junction.





Let's Start or Continue the Conversation

We look forward to hearing about your organization and community objectives. For groups aligned with our sponsor/partner criteria, we will design a custom campaign and establish quantifiable outcome criteria so you can measure our success.

References Cited

1. National Financial Educators Council. Survey conducted December 22, 2022 among all NFEC clients and individuals in the NFEC contact list. Data analyzed at 95% confidence interval with 6% margin of error.
2. Gender data collected from 92,184 users via Google Analytics (<https://analytics.google.com>) December 1, 2021 – December 22, 2022.
3. National Financial Educators Council. Survey conducted ending March 1, 2021 among all NFEC clients. Data analyzed at 95% confidence interval with 5% margin of error.
4. Financial Samurai. How much money do the top income earners make? December 13, 2022, <https://www.financialsamurai.com/how-much-money-do-the-top-income-earners-make-percent/>
5. Data collected via Google Analytics (<https://analytics.google.com>) 'In-Market Segment,' December 13, 2022.
6. Data collected via Google Analytics (<https://analytics.google.com>), December 17, 2021 – December 17, 2022.
7. Data collected via SEMRush (<https://www.semrush.com>) Marketing Research, November 3, 2022.
8. Data collected via WebCEO (<https://www.webceo.com>) SEO & Digital Marketing Tools, December 2, 2022.
9. Data collected via Mentionlytics (<https://www.mentionlytics.com>) Social Media Monitoring & Reputation Management, December 24, 2021 – December 24, 2022.
10. Data collected via AWeber™ (<https://www.aweber.com>) Email Marketing Platform, December 14, 2022.