



# FPFE

Foundation for Personal Financial Education

12520 High Bluff Dr., Ste 220, San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936  
[www.FPFEnonprofit.org](http://www.FPFEnonprofit.org) The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization  
Worksite Solutions, LLC nor FPFE are not affiliates of AMS. AMS does not endorse Worksite Solutions, it's services or products.



# FPFE

Foundation for Personal Financial Education

Dear Prospective Member,

Thank you for your interest in our Community Giveback organization. Our Foundation was built with the goal of becoming one of the largest “community giveback” programs in the country. Our members are successful in their chosen fields. More importantly, our members share a common goal of giving back. We know that the work that we do impacts lives.

Accordingly, our expertise provides us with not only a rare opportunity, but also an obligation to help others. Through our organization, you will have the opportunity to assist literally thousands of individuals as they seek assistance in the achievement of their financial goals.

If we can assist you in any way, do not hesitate to call.

We welcome you and wish you and those that you come into contact with the best of success!

Michael Lincoln  
Director FPFE

Douglas Irwin  
Director FPFE

12520 High Bluff Dr., Ste 220, San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936  
[www.FPFEnonprofit.org](http://www.FPFEnonprofit.org)

The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization



# FPFE

Foundation for Personal Financial Education

## **What is the Foundation for Personal Financial Education?**

The Foundation for Personal Financial Education (FPFE) is a non-profit, 501c3 organization dedicated to financial awareness in the community. Our organization consists of various financial professionals who donate their time to speaking and counseling. Financial Advisors, Attorneys, Accountants, Mortgage Brokers, Real Estate Agents, and Long Term Care Specialists conduct instructional workshops on a variety of topics ranging from Retirement planning to Estate planning.

The Foundation for Personal Financial Education has conducted these workshops at the City, County, State, Federal, and Fortune 500 levels. With hundreds of workshops conducted each year, FPFE has become one of the foremost speaker's bureaus in the country.

**12520 High Bluff Dr., Ste 220, San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936  
www.FPFEnonprofit.org**

The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization



# FPFE

Foundation for Personal Financial Education

## **What is unique about FPFE and why is it successful?**

1. You are promoting a non-profit, educational organization (speaker's bureau) that provides audiences with generic, financial educational information.
2. You are providing a series of workshop topics vs. a "one time" seminar.
  - Getting Fiscally Fit
  - Retirement Planning
  - Estate Planning
  - Real Estate Today
  - Home and Asset Protection
  - Home Ownership and Refinancing
  - Long Term Care
  - Income for Life
3. The series of workshops will typically require that you return each month. Inevitably you will develop relationships with some of the workshop attendees.
4. Each workshop will require you to spend 45 minutes to 1 hour with the participants. At the end of the workshop you will get back "Program Evaluations." Be prepared for a majority of the attendees to request consultations with you.
5. These people have indicated that they want to come in and see you. They are awaiting your call for an appointment where they will then be able to tell you what they need and why they are there (in your office). You are required to provide these individuals with at least an hour consultation at no charge.
6. This is a great opportunity to for you to give back to your existing clients and those that you know in the community by conducting workshops at their places of employment.

12520 High Bluff Dr., Ste 220, San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936

[www.FPFEnonprofit.org](http://www.FPFEnonprofit.org)

The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization



# FPFE

Foundation for Personal Financial Education

7. Your cost to put on a series of classes for one company may run between \$50 and \$500, you should consider your willingness to cover these expenses on your own as we will not charge the company for this....this is a Community Giveback Program!

12520 High Bluff Dr., Ste 220, San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936  
[www.FPFEnonprofit.org](http://www.FPFEnonprofit.org)

The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization



# FPFE

Foundation for Personal Financial Education

## Where do you give back?

There are many different ways that you can give back, among them are:

- Your clients. If they work then their company is a perfect place to start. Get a personal introduction to the H.R. or Training Manager.
- Your friends. If they work, then repeat the same process as above.
- Your neighbors.
- Clubs, associations, trade groups, and organizations are always looking for speakers for their meetings.
- Chamber of Commerce
- Centers of influence. Attorneys, mortgage brokers, and accountants.
- The yellow pages.
- Directories.
- Business and Association lists found at the library.
- The newspaper.
- Church
- SHRM (Society for Human Resource Managers)
- The Association of Associations
- Credit Unions
- While driving
- Senior Centers

12520 High Bluff Dr., Ste 220, San Diego, CA 92130 Tel: (858) 793-4440 Fax: (858) 509-9936  
[www.FPFEnonprofit.org](http://www.FPFEnonprofit.org)

The Foundation for Personal Financial Education is a 501(c)(3) nonprofit educational organization