

Financial Literacy Teamwork - Advancing our Profession in Arizona

Call to Action - Actions Available to Interested Readers responding by 9/30/2023



Who to contact about this article: Jason Parker [JParker262@gmail.com, (480) 278-5466]

More information can be found here: <https://www.fpaofphoenix.org/page-1836822>

Call for Financial Literacy Course Instructors or Team Volunteers

Financial Literacy Course instructor opportunities may be in-person or online instruction with leadership opportunities for those who may want to help administer the program.

*What we would like to know now to help forecast our human capital is whether you'd:

- 1) potentially be interested in teaching financial literacy course on behalf of the chapter (no commitment yet) starting in January 2024. (There could be ad hoc opportunities that come up before if a need presents itself)
- 2) have contacts or an interest in helping the chapter's efforts in this space, but not be an instructor

One ambition many of our members share within FPAGP is a desire to give back to our community and expand the number of community members who might recognize and value Financial Planning. These activities happen within the FPAGP "Advancing the Profession" group and its component teams. Many public and private organizations would benefit from FPAGP leadership actively delivering quality financial literacy courses on a regular, recurring, and expanding basis. There are no other stakeholders in our community that have access to the professional financial planning talent and proven qualifications than our chapter has who might be capable of unearthing and supporting a ready team of financial literacy course instructors.

Advancing the Profession volunteers are currently working to develop a sustainable, scalable Financial Literacy program for an organization like ours to offer and support (with so many moving parts, volunteer and member instructors, and seemingly endless community need). We are being strategic with our approach

because 1) we are financial planners (practice what we preach), and 2) we want to implement a system that can survive (even thrive) by maximizing the teaching opportunities for our members, upholding high delivery standards for our consuming public, and utilizing chapter resources effectively. We've hit 2 out of 3 before...we want 3 out of 3 before we move forward.

In June, July and early August, we are vetting a litany of financial literacy curriculum providers while building/expanding relationships with financial literacy stakeholders in AZ. These relationships include academic, non-profit, and legislative organizations. By the end of August a summary of our research and recommendations will be compiled into a report and suggestions to our Executive Director for further potential action and 2024 budgeting by the Board of Directors.

Once we know our path forward, we will organize logistics between October-December, aiming for financial literacy course delivery to resume in January 2024.

Logistics between October and December include:

- Identifying/convening both the continuing plus additional (volunteer) CFP® Professionals as instructors,
- coordinating with target audiences/organizations who want to book/consume our courses, and
- procuring any grants/donations to help fund/offset financial literacy program costs.

-30-

Need more information/help on this topic?

Contact the chapter:

1. E-mail Admin@FPAofPhoenix.org,
2. Use the article Headline as the email Subject line,
3. Identify the information/help you are seeking in the body of your email.

Or call us! 480-483-9035



By **Melissa Kemp**, posted on 6/21/2023 for news from 6/1/2023

A 20 year chapter member, Melissa also serves as Executive Director.

Responsibility of:

Financial Literacy Initiative