

- Over 2 million Americans filed for bankruptcy in 2005, the highest rate in history.
- For the first time since the Great Depression, the nation has a negative savings rate with Americans spending \$1.20 for every \$1.00 saved.
- Fifty-five percent of American workers have no idea how much they will need to save to make their retirement dreams a reality (<http://www.remtech.biz/FactsAndStats.htm>).
- Only 5 percent of investors believe they know everything they need to make good investment decisions (<http://www.remtech.biz/FactsAndStats.htm>).

CPA Volunteer Resources

Whether you are interested in educating students, adults, soon-to-be retirees or entrepreneurs, you will find the tools you need on the Financial Literacy Resource Center at: www.aicpa.org/financialliteracy.

360 Degrees of Financial Literacy is the CPA profession's pro bono effort to improve American's financial literacy. CPAs involved with the 360 Degrees of Financial Literacy efforts agree to volunteer their time and expertise to get Americans on the right financial path through free community events void of marketing and advertising of services. In the tradition of working for the public good, CPAs must agree to use resources only for volunteer or pro-bono educational purposes.

Use these resources to jumpstart your volunteer efforts:

- **Free CPE Program**— an overview of all major financial literacy topics
- **CPA Mobilization Kits**—PowerPoint presentations with notes, fact sheets and handouts to help you effectively communicate with your audiences

“I invite every CPA in this country to join the cause of 360 Degrees of Financial Literacy. There are millions of Americans who need our help. Together, we can make a difference.”

Carl George, CPA
Chair, National CPA Financial Literacy Commission

- **Instructional Packets**—useful for instructing students, grades K-12, including PowerPoint presentations, handouts and brochures
- **User Guide**—provides everything you need to conduct a successful financial literacy event, such as sample invitations, fact sheets and attendee questionnaire

Making a Difference Today

Thousands of CPAs across the country have joined the campaign to spread financial literacy; however, there is still much work to be done.

Whether you can contribute an hour a month or an hour a year, your involvement can make the difference in improving the financial literacy of Americans.

Becoming involved is a simple and easy process:

- Contact your state CPA society
- Consult the User Guide to plan an event (click on “Resources for All Members” to access the guide)
- Please keep us informed of your efforts

Tools for Consumers are Just a Click Away

The *360 Degrees of Financial Literacy* Web site—www.360financialliteracy.org—provides ongoing updates and resources to keep Americans current on financial matters.

Becoming involved is a simple and easy process:

- **Featured Articles** provide information on current topics, such as tax tips during tax season
- **Weekly Spotlight** features a different set of financial planning resources each week
- **Ask the Money Doctor** is an online forum where CPAs and CPA Personal Financial Specialists answer questions submitted by the public
- **360 for Women** covers such topics as how to get started in financial planning, owning a business, building your career and growing your household
- **Financial Guidance for Every American** is a user-friendly guidebook covering all the basics, such as budgeting, tax-planning, home ownership, life insurance and retirement planning

Awards and Recognition

- 2005 Platinum Award, League of American Communications Professionals
- Top 50 Communications Materials of 2005, League of American Communications Professionals
- Financial Planning Award of Excellence, CPA Wealth Provider
- 2005 Clarion Award, Women in Communications
- 2005 Summit Award, American Society of Association Executives
- 2005 Platinum PR Award, Honorable Mention, PR News
- 2005 MarCom Creative Awards, Gold Winner for Oregon Food Bank Video News Release

- 2005 WEBAWARD, Web Marketing Association, Standard of Excellence for www.360financialliteracy.org
- Web Star of the Week Award (June 2005). WebCPA
- 2004 Summit, American Society of Association Executives For *Disaster Recovery: A Guide to Financial Issues*

For more information, please email us at financialliteracy@aicpa.org.

We welcome your questions and comments and hope to share your successes with CPAs across the nation.

