



2nd Annual Celebration and Fundraiser Event

Celebrating 14 years of Promoting and
Teaching Financial Education

The Literacy Institute for Financial Enrichment, Inc. (LIFE), founded in 2003, is a 501(c)3 educational and charitable nonprofit organization that provides educational programs and resources to individuals, families, and youths that helps consumers take control of their financial futures, and thereby enable them to strengthen the communities in which they live. We are based in the Metropolitan Washington D.C./Maryland area.

LIFE works to develop, nurture and promote meaningful partnerships with nonprofits, governmental agencies, community-based organizations, and faith-based institutions to implement comprehensive programs that help develop financially stable individuals, families, and communities. Our **community-centric mission** is to enable consumers to expand their financial knowledge, avoid and reduce excessive debt, develop self sufficiency, and create, preserve and transfer wealth.

LIFE's Primary Focus Areas:

- Youth Development Programs
- Homeownership Programs
- Non-profit Technical and Developmental Assistance
- * Financial Education Programs
- * Financial Education Curriculum Development

LIFE Board of Directors

- Robert Kinzer, President
- Lanta Evans-Motte, MBA, RFC®, RICP®, Vice President Admin
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- * Schnearia Ashley, Director-Community Programs
- * Linda Currie, Director-Marketing
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- * Jim Thornton, MBA, Director-Curriculum

Anniversary Celebration Agenda Country Club at Woodmore Thursday, October 26, 2017

6:00pm to 6:45pm	Networking Reception
6:00pm to 7:45pm	Silent Auction
6:45pm to 7:45pm	Welcome: Robert Kinzer, LIFE President & Schnearia Ashley, Mistress of Ceremonies Greetings: LeCount Davis, Sr., First African American CFP® Certificiant LIFE Organizational History & Highlights: Lanta Evans-Motte, LIFE VP Operations & Admin Keynote Speaker: Marcus Johnson, Musician & Entrepreneur Recognition of Special Guests & Student Participants Presentation of Awards: 2017 Partner Award: KEL Education Foundation (KELEF) Closing Remarks
7:45pm to 8:30pm	Networking Reception

Anniversary Celebration Committee: Lucretia Freeman-Buster, Tiehdi Johnson, & LIFE Board of Directors; Event Chair, Robert Kinzer

THANK YOU FOR YOUR SUPPORT OF LIFE AND ITS PROGRAMS
P.O. Box 208, Lanham, MD 20703; www.FinancialEnrichment.org

Literacy Institute for Financial Enrichment (LIFE)
Organizational History and Strategic Partnerships

Since inception, LIFE has regularly been invited to conduct financial education seminars on numerous college campuses, including Howard University, University of Maryland, Prince Georges Community College, Bowie State University, and Howard Community College.



Bob Kinzer presents to students at Howard Community College—Sep 2017

Throughout each calendar year, LIFE plans & implements community-wide financial and economic development-related educational events and workshops. We have partnered with numerous organizations to conduct single & multi-session educational programs, hosting over 130 events & establishing more than 40 partner alliances.

We have been an Alliance Partner of the FDIC for their MoneySmart Program since 2011; and for the past six years, we have partnered with the America Saves Initiative, hosting financial

educational events and disseminating financial literature.

We also partner with NEFE, the National Endowment for Financial Education, an educational

partner that provides youth educational resources.

We partnered with Maryland National Capital Park and Planning Commission (M-NCPPC) to conduct financial literacy seminars for teenagers as part of their “Handling the Finances Series: “College to Career Prep” and “Creating Wealth in a Hip Hop World.”

We have regularly partnered with Prince Georges County Delta Alumnae Foundation, as well as with Prince Georges Alumnae and Federal Alumnae City Alumnae Chapters of Delta Sigma Theta to conduct financial literacy events as part of their “Financial Fortitude” Programs for adults and/or as part of their Embodi or Delta Gems Youth Mentoring Programs.

From 2006-2012, we partnered with Comto to present a very successful annual Spring Forum and/or multi-session Seminar Series.





Money Management for Teens & Adults

For Ages 12 to 82

Jan. 28, 2017
1:30pm-5:00pm
(doors open at 1:15 pm)

Metropolitan AME Church
 1518 M St NW
 Washington DC 20009

Fee - \$5 student, \$10 adult
(Students must be accompanied by an adult. Limited space)

Register by Jan 25 at:

<https://www.eventbrite.com/e/family-financial-fitness-a-wealth-building-forum-for-ages-12-to-82-tickets-30735762493>

Light refreshments served

For more info contact:
 Deborah Berry at deborahdberry@aol.com or
 Karla Bruce-Choice at karlabruce@hotmail.com

Confirmed Speakers:

Michelle Singletary
Nationally Syndicated Personal Finance Columnist, The Washington Post
Author, "The 21 Day Financial Fast: Your Path to Financial Peace and Freedom"
*** Purchase an autographed copy of Michelle's book online for a discount**
Michelle will lead a special workshop for adults from 3:30 – 4:30

Lanta Evans-Motte, MBA, RFC, RICP
Financial Advisor, Raymond James Financial Services, Member FINRA/SIPC
 Director of Outreach, Literacy Institute for Financial Enrichment (LIFE)

Note: The workshop includes both separate and joint sessions for students and adults.
 Register online by January 16 to be entered into a drawing for special door prizes

Literacy Institute for Financial Enrichment (LIFE)
MAJOR PROGRAMS-Student Enrichment Programs

Youth Savings & Investment Club

The mission of the YIC is to increase students' knowledge of financial matters so they can become better stewards, responsible savers, investors, and consumers. **Goals and Objectives:** Students improve their financial acumen while learning to identify and prioritize their personal money management goals; Students understand the tradeoffs between personal consumption and delayed gratification **Focus Areas:** Focus areas may include: Fundamental of Money Management: banking; savings; budgeting; time value of money; compound interest; credit and debt management; Introduction to investments: asset allocation; diversification; how to read the Wall Street Journal/financial pages; Investment management: portfolio evaluation and review, company analyses and evaluation, corporate ethics; Portfolio reviews and stock portfolio contest.

The program is currently structured as a joint program with **Reid Temple AME Church**, which is not affiliated with LIFE.

Other Youth Enrichment Programs

We endeavor to help students reach their full potential and make a positive impact on humankind! LIFE has partnered with several local & national youth financial education programs including **DERF Executive Youth Leadership Summit**, **United States Capital**; & the **National Black MBA Association**, Annual National Conference for their **Leaders of Tomorrow Program**, which included students from across the U.S. & Europe.

Other partners have included **Junior Achievement**, **Girl Scouts of America**, **Boys and Girls Clubs of America**, **Delta Sigma Theta's Delteens**, **Embodi**, & **GEMS Youth Mentoring Programs**, & **KEL/Alpha Phi Alpha Male Youth Mentoring Program**.



The poster is for a "Financial Management Bootcamp For Students" held on Saturday, April 15, 2017, from 9:30am to 1:30 pm at Reid Temple AME, Glendale Campus, 11400 Glenn Dale Blvd, Glenn Dale, MD 20769. It is a joint project with the Literacy Institute for Financial Enrichment. The goal is to equip youth with solid financial understanding and tools. Top student presentations will be eligible for a \$25 savings account. The targeted age range is 12-18 years of age. Registration opens March 15, 2017. For more information and to register, contact www.FinancialEnrichment.org or 301-459-5515. Attendance is limited to the first 70 registrants. Students will be introduced to: Stewardship Principles, Money Management, Comparison Shopping, Credit & Debt Management, and Intro to College Funding & Career Exploration. The poster features a logo for Reid Temple AME Church, a tree logo for the Literacy Institute for Financial Enrichment, and images of a dollar sign and money.



Jan 2017 Event: Speaker Michelle Singletary with YIC Student/Girl Scout (left); YIC Students/Scouts, Speakers, & Mentors (right).

Literacy Institute for Financial Enrichment (LIFE)

MAJOR PROGRAMS—TECHNICAL ASSISTANCE

LIFE regularly provides technical assistance to various organizations which could entail something as simple as helping to identify & secure speakers and relevant financial educational literature for upcoming events; to more complicated technical assistance such as assisting with operational issues, board training, financial operations, event planning, & marketing.

FAITH-BASED PROGRAMMING:

We have partnered with numerous churches and faith-based organizations all over the country to conduct seminars and workshops; and also to offer technical assistance to them in implementing their programs. For instance, in the Fall of 2015, we assisted the **Reid Senior Center** with identifying and securing speakers for their weekly educational sessions. We also assisted in securing onsite “fall prevention” training at the rehabilitation center of a local physical therapist.



HOUSING EDUCATION AND EVENTS:

Coalition for Homeownership Preservation, Prince Georges County

The Coalition for Homeownership Preservation in Prince George's County was formed in 2007 by public & private sector leaders to address the high number of foreclosures occurring in Prince Georges County. **LIFE served on the Coalition's Steering Committee** for several years & provided strategic assistance with their marketing and community outreach efforts. We led development of a Coalition Brochure, Coalition Newsletter & Coalition/LIFE Housing & Foreclosure Prevention Resource Directory.

LIFE Partnerships for Housing-Related Education Programs

LIFE has participated in joint events with a variety of non-profit, faith-based, governmental and private organizations, including: The Coalition for Homeownership Preservation in Prince George's County, National Community Reinvestment Coalition (NCRC), Consumer Action, MD Department of Housing & Community Development, U.S. Department of Housing & Urban Development (HUD), Prince Georges County Department of Housing and Community Development, Neighborworks, MD Housing Counselors Network, MD Department of Agricultural Extension Services, Montgomery County Department of Housing, HUD-Approved Counseling Agencies in Prince Georges County, Federal Deposit Insurance Corporation (FDIC), the Assn of African American Financial Advisors (AAAA), National Foundation for Financial Education (NEFE), Reid Community Development Corporation (RCDC), Delta Sigma Theta, Delta Challenge Homeownership Program; and McCeda.

STUDENT PROGRAMS:

Junior Achievement (JA) Finance Park®, in Prince Georges County!



JA has an interactive simulation to help students learn to budget & improve financial decision-making. The tablet-based budgeting simulation provides students immediate feedback to see tradeoffs involved in financial decision-making.

LIFE coordinated volunteers to participate for a full day in the JA program. In April 2016 photo at right, LIFE board member Lanta Evans-Motte poses with two **former YIC participants** (Taylor Russ & Malcolm Ryant) who have graduated college and returned to serve as mentors to students at JA Finance Park®.

