Started by concerned NAPFA members in 2005, the NAPFA Consumer Education Foundation (NCEF) is a 501(c)(3) non-profit, charitable organization that continues to fulfill its established purpose to help advisors serve consumers on a pro bono basis by supporting and advocating education in matters of personal finance in a manner that is free from conflicts of interest.

“We have the best advisors in the world, who work miracles for people’s futures. Let’s help those who can’t afford our help, yet who can’t afford not to have our help.” Skip Schweiss, NCEF President

NCEF energized the NAPFA membership at the 2018 NAPFA Fall Conference challenging members to give pro bono time in their communities by launching the One Hour Challenge and setting a goal of 3,000 aggregate pro bono hours or one hour per member. Thank you to all the NAPFA members that gave back in their communities and reported their experiences. Here are some results to be proud of:

| 3,000 hours | Pro Bono Hour Goal |
| 3,173+ hours | Goal Achieved! |
| 3,000 members | Member Participation Goal |
| 202 members | Members who Reported Hours |
| 5% | Percent Participation of Membership |
| 70% | Percent of One-on-One Engagements |
| 7,685 consumers | Number of Consumers Helped |

Vision

Changing lives through pro-bono financial advice.

Mission

Empower consumers to achieve positive financial outcomes by supporting fee-only financial advisors in providing objective financial guidance on a pro-bono basis.
Who Have NAPFA Members Helped?

How Did You Volunteer?

What NAPFA Region Won for Greatest Participation?

For What Organizations Did You Volunteer?
Programs of the NAPFA Consumer Education Foundation

For 14 years the NAPFA Consumer Education Foundation’s mission is to empower consumers to achieve positive financial outcomes. We support Fee-Only financial advisors in providing objective, pro-bono financial guidance to consumers. NCEF fulfills its mission with the following programs:

**Building Homes for Heroes (BHH)** is a highly successful partnership where NAPFA members provide up to two years of one-on-one pro bono financial advice to disabled military veterans who were recently gifted a mortgage-free home. Since 2013,

- 126 NAPFA members have given pro bono one-on-one financial advising.
- 146 U.S. military veterans have received NAPFA member pro bono support.

**NCEF at Home Gifting Celebration in Joliet IL, September 2019**

Testimonials from Home Recipients:
- “Our calculations helped us set a plan towards our goal of being debt-free by March of 2019.” Hugo G.  
  *(See Hugo’s video testimonial here)*
- “His expertise allowed us to go on our first family vacation in several years with no vacation debt.” Jared S.
- “Having an advisor in our corner feels like someone else is keeping an eye on things, too!” Jesse W.

**Money Smart Week** is a partnership with the Federal Reserve Board of Chicago, where NCEF is a “National Champion”, coordinating NAPFA advisors to deliver presentations on personal finance.

- This is a once-per year commitment
- Over 40 NAPFA members have participated since 2018

**The One Hour Challenge** was developed by NCEF to support NAPFA members’ desire to conduct pro-bono activities in their communities.

- Launched in October 2018 with the goal of 3,000 aggregate hours by members.
- The New One-year Goal starting with the 2019 NAPFA Fall Conference is:
  - 6,000 pro-bono hours
  - 10% NAPFA member participation

**Future Programs:** NCEF is assessing new programmatic ideas as identified by the One Hour Challenge.
Volunteer as a Pro Bono Advisor or Join the NCEF Board/Committee

The NAPFA Consumer Education Foundation (NCEF) is one way NAPFA members can give back and help those less fortunate. Imagine our impact if we shared our skills on a pro-bono basis with people who otherwise would not have access to our expertise? Our guidance could be life-changing! You can help make a difference in your community by joining your NAPFA peers who support the efforts of the NCEF.

To volunteer, please go to www.napfafoundation.org/about-us/ or contact Rob Harkey, NCEF Program Coordinator at harkeyr@napfa.org or 847-483-5400 x 106

Consider Donating to Support NCEF Programmatic Efforts

Make a meaningful impact by donating to the NAPFA Consumer Education Foundation today! Your support can make a life-changing difference for the less fortunate who seek financial security. All contributions are tax-deductible and support mission critical programs. Please donate online at NAPFAfoundation.org/donate.

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