

INSTITUTE FOR FINANCIAL LITERACY®



Facts about the Institute

The Institute for Financial Literacy is a 501(c)(3) tax exempt nonprofit organization whose mission is to promote effective financial education and counseling. Founded in 2002, the Institute has provided financial education, counseling and information to nearly 500,000 consumers.

The Institute accomplishes its mission by working with organizations to incorporate financial education into their existing services.

If you would like to learn more about working with the Institute, please contact us or visit our website at www.FinancialLit.org.



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www.FinancialLit.org

Summary Overview:

- Founded in 2002
- Tax Status: 501(c)(3) Tax Exempt Nonprofit Corporation
- Located in South Portland, Maine
- Executive Director/Founder: Leslie E. Linfield, Esq.
- Number of Professional Certifications Issued: Over 3,500
- 2013 Annual Conference on Financial Education: Over 150 Attendees
- 2013 Excellence In Financial Literacy Education (EIFLE) Awards: 16 Awards Presented
- Number of Pieces in Library of Personal Finance: Over 2,200

Notable Accomplishments:

- The Government Accountability Office (GAO) Highlights the Institute for Financial Literacy's Accreditation and Certification Programs (2011)
- Established the Council on Financial Education Accreditation (2010)
- Among the top national providers of financial education and counseling (2009-2010)
- Recognized in the Congressional Record by Senator Olympia Snowe for its commitment to financial education and counseling (2008)
- Established the Excellence In Financial Literacy Education (EIFLE) Awards (2007)
- Established the Center for Consumer Financial Research (2007)
- Established the Annual Conference on Financial Education (2006)
- Established Fincert.org (2006)
- Established the Library of Personal Finance (2005)
- Established the National Standards for Adult Financial Literacy Education (2004)
- Established the Center for Consumer Financial Education (2002)

Published Research:

- 2010 Annual Consumer Bankruptcy Demographics Report
- 2009 Annual Consumer Bankruptcy Demographics Report
- Proposed Rebates in 2008: How will Americans Spend their Tax Rebate Checks?
- Who Went Bankrupt in 2006? A Demographic Analysis of American Debtors
- Aging and Bankruptcy: Are Older Americans Truly Offered an Economic Fresh Start? (2007)
- First Demographic Analysis of Post-BAPCPA Debtors (2006)

Continued...

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Programs and Services



National Standards for Adult Financial Literacy Education™

Established in 2004 and revised in 2007, the purpose of the National Standards is to identify the fundamental concepts educators should use to empower individuals to make informed decisions about consumer financial products and services.



Financial Education Curriculum

The Institute offers consumer education programs covering personal finance topics for all ages and life stages. Programs come with workbooks, money management worksheets, resource guides, assessment and evaluation tools, PowerPoint presentations and teacher's guides.



Annual Conference on Financial Education™

Established in 2006, the mission of the Annual Conference on Financial Education is to promote the effective delivery of consumer financial products, services and education by hosting a national conference for professionals providing these services. This national conference is held in April each year.



Excellence In Financial Literacy Education (EIFLE)™ Awards

Established in 2007, the mission of the EIFLE Awards is to promote the effective delivery of consumer financial products, services and education by acknowledging the accomplishments of those that advance financial literacy education. The EIFLE Awards dinner is held each year during the Annual Conference on Financial Education.



Fincert.org™

Established in 2006, the mission of Fincert.org is to promote the effective delivery of consumer financial products, services and education through the professional certification of individuals providing these services.



Council on Financial Education Accreditation™

Established in 2010, the mission of the Council on Financial Education Accreditation is to promote the effective delivery of consumer financial products, services and education through the establishment of business, education and counseling standards, and the accreditation of organizations under these standards.



Center for Consumer Financial Research™

Established in 2007, the mission of the Center for Consumer Financial Research is to promote the effective delivery of consumer financial products, services and education through the dissemination of research within these fields.



Library of Personal Finance™

Established in 2005, the mission of the Library of Personal Finance is to preserve the accumulated knowledge of consumer financial products, services and education by maintaining a physical collection of materials related to these fields.

What Others Are Saying...

“The Institute for Financial Literacy sets the standard for financial education and counseling. Their programs contain actionable content that facilitates long-term financial wellness.”

- Rod Griffin, Director,
Public Education, Experian

“The Aspen Institute made the strategic decision to partner with the Institute for Financial Literacy because they’ve demonstrated an unwavering commitment to providing quality financial education in innovative ways.”

- Kirsten Moy, Director,
Scale Initiatives, Aspen Institute

“The Institute for Financial Literacy is one of the foremost leaders in financial education and wellness programs. Their results-oriented curriculum equips individuals to take charge and improve their financial situation.”

- Russell Graves, Executive Director,
Consumer Credit and
Budget Counseling