

State Chapter Campaign Report for **Ellis Cropper**

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Introduction

Thank you, Ellis Cropper!

We rely on the generosity of our Patrons to fund our state and local financial wellness programming. Although this report is focused on the benefits you receive, your support has allowed us to empower local organizations with financial education resources, fund advocacy initiatives, and build an advisory board to serve people from across the state.

As you know, the country is facing a crisis and many of the problems people face daily are caused or directly affected by their financial situations. With your support, we aid communities in their efforts to work toward economic empowerment through financial education.

Empowerment

Your generous sponsorship funds the financial empowerment of your community's citizens. We provide personnel and resources to help organizations grow and scale financial literacy programs as well as resources for individuals and families.

Advocacy

The NFEC leads a comprehensive advocacy campaign to encourage focused attention on the financial well-being of its local citizens. Campaign components are available to encourage parents to teach their children about money, schools to adopt financial education programs, and individuals to improve their financial knowledge.

Relationships

Our local campaign director actively builds local relationships with beneficiary organizations, community leaders, media and influencers, and other people who will help us meet the social impact objectives established through this campaign.

Social Impact & Community Service

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Donations & Advocacy Overview

Donations

Ellis Cropper's generous sponsorship funds the financial empowerment of his community's citizens with donations to beneficiary groups. We provide personnel and resources to help organizations grow and scale financial literacy programs as well as resources for individuals and families.

In the first six months, we provided resources to 82 groups in Massachusetts.

Advocacy

The NFEC leads a comprehensive advocacy campaign to encourage focused attention on the financial wellbeing of stakeholders across the U.S. and additional efforts abroad. Campaign components are available to encourage parents to teach their children about money, schools to adopt financial education programs, and individuals to improve their financial knowledge.

In the first six months, the various advocacy campaigns included a review and promotion of Massachusetts financial literacy standards, the Financial Educators Day Awards, statewide financial literacy test promotions, and other general advocacy promotions. Exposure was generated via email contacts, through social media, paid ads, press releases, and media pickup, generating the results detailed in this report.



Featured Beneficiary Organizations

The Massachusetts Financial Educators Council supports diverse community beneficiary organizations toward one shared objective: helping people work toward economic empowerment. Our beneficiary organizations and partners, who are committed to financial well-being in communities around the globe, are directly supported by our team's efforts and dedication.



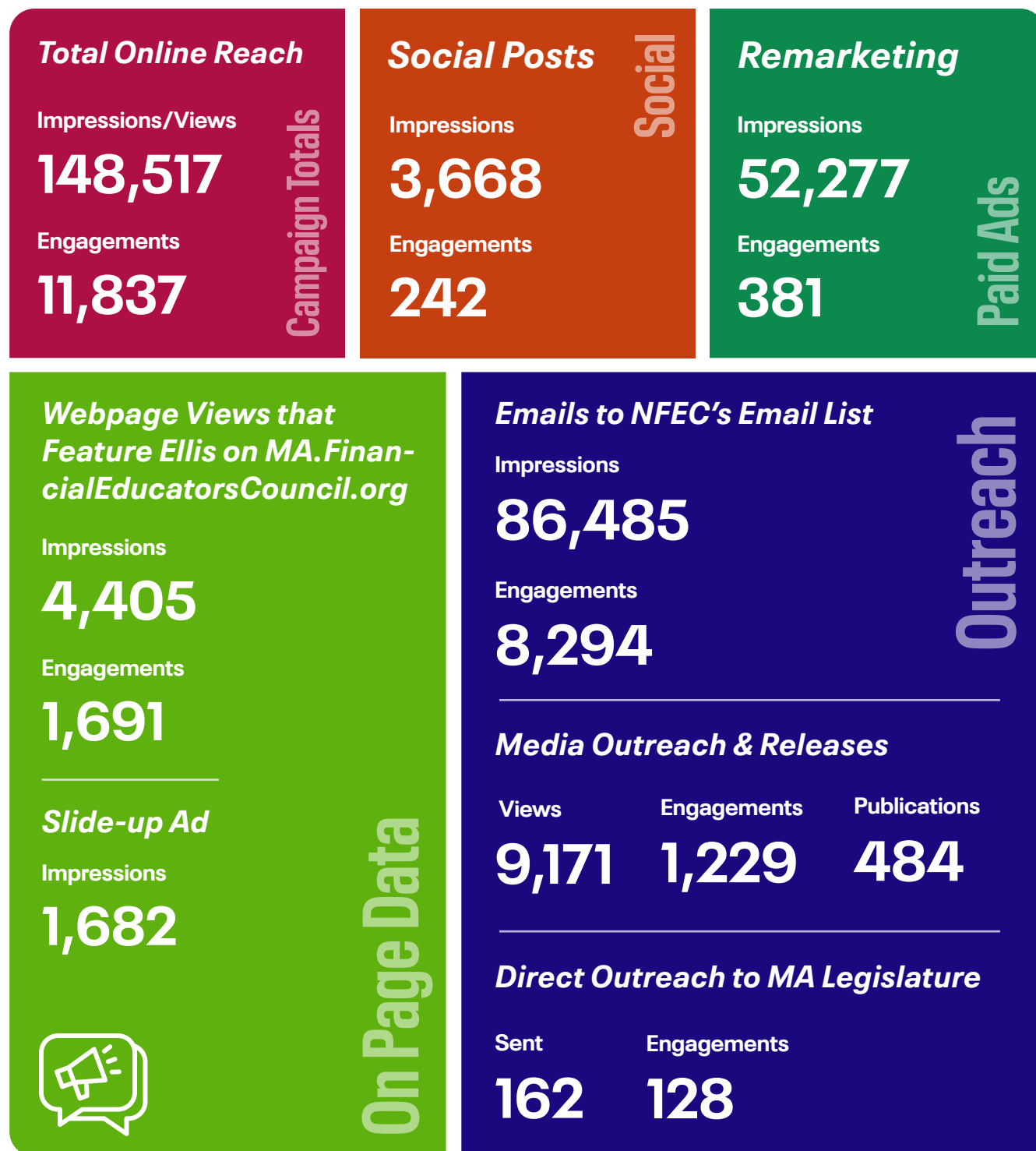
Select Organizations Supported

Vernon Hill Elementary School. Students completed a year-long course led personally by Ellis Cropper, a Certified Financial Education Instructor (CFEI®). This program taught students personal finance topics that ranged from career planning and entrepreneurship to developing positive financial habits and understanding the cost of living.

Orchard Street Academy. Orchard Street Academy (OSA) is a public therapeutic school serving students in grades 6-12. OSA's programming includes core academics, individual and group counseling, art and music therapy, a range of high-interest electives, and clinical case management.

Lincoln Public Schools. The Lincoln School Committee is responsible for preschool to grade 8 educational programs at Lincoln School, which serves approximately 600 students. Lincoln School is one of the initial member schools in the METCO Program, a voluntary desegregation program that provides an opportunity for students from Boston to enroll in suburban school districts.

Overall Campaign Exposure, Assets, & Reach Synopsis



Brand Assets & Board Development

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Advisory Board Development & Leadership Position

Ellis Cropper's leadership as the Founding Member of the Massachusetts Financial Educators Council led to the development of the state Advisory Board. The NFEC recruited and onboarded prominent leaders in the community to provide strategic direction and guidance for financial education initiatives, fostering partnerships with local organizations and schools to expand financial literacy programs.



Ellis Cropper

ChFC®, CLTC®, is a Financial Professional with New York Life, Retired Major with a 34-year career in the U.S. military, and was previously an Assistant Professor of Military Science at Widener and Villanova Universities. He recently earned his MBA at Nichols College and actively teaches personal finance to elementary students. Ellis is the Founding Member of the MFEC's Advisory Board.

.....



Andrew Lendnal

Financial Wellness Expert, bestselling author, and internationally known speaker, has written seven books simplifying financial concepts for readers of all ages.

.....



Elizabeth Clark

Chief Information Officer (CIO) at Harvard Business School, spearheads campus-wide initiatives and speaks locally and nationally on topics related to IT in higher education.

.....



Mahendra Pattni

Head of Finance at Bill & Melinda Gates Medical Research Institute, develops finance team members into collaborative business partners.

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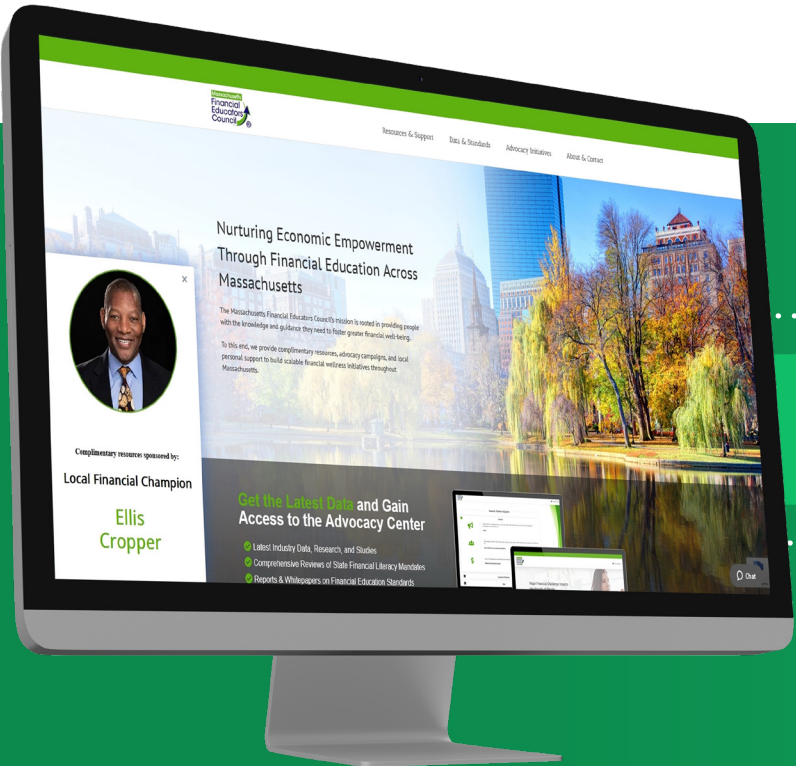


Mary Ellen Normen

Administrator for Business & Finance at Lincoln Public Schools, is a skilled strategic leader and coach of human creativity, ingenuity, compliance, and process improvement.

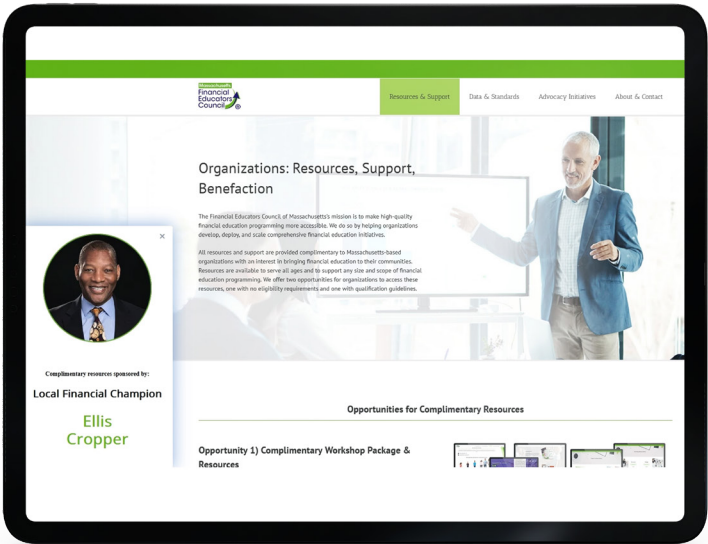
State Webpage Features

Prominent features of Ellis Cropper’s leadership of this campaign were posted across the state chapter website.



MAIN PAGE FEATURE

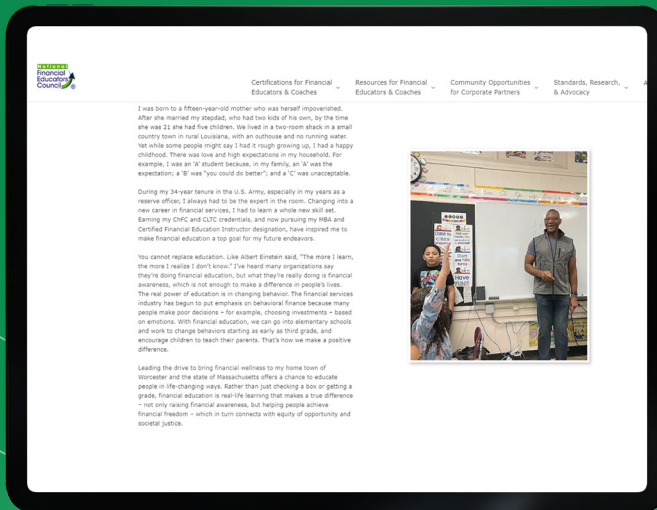
DONATION PAGE FEATURE



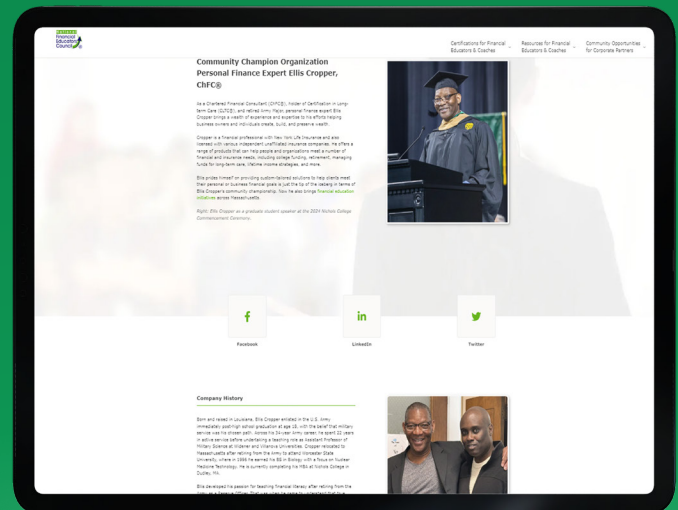
National Site Webpage Features

Prominent features of Ellis Cropper's leadership of this campaign were posted across the NFEC national website. Three core messaging themes emerged from these pages that highlighted his leadership, expertise, and community service.

COMMUNITY SERVICE FEATURE



EXPERTISE FEATURE



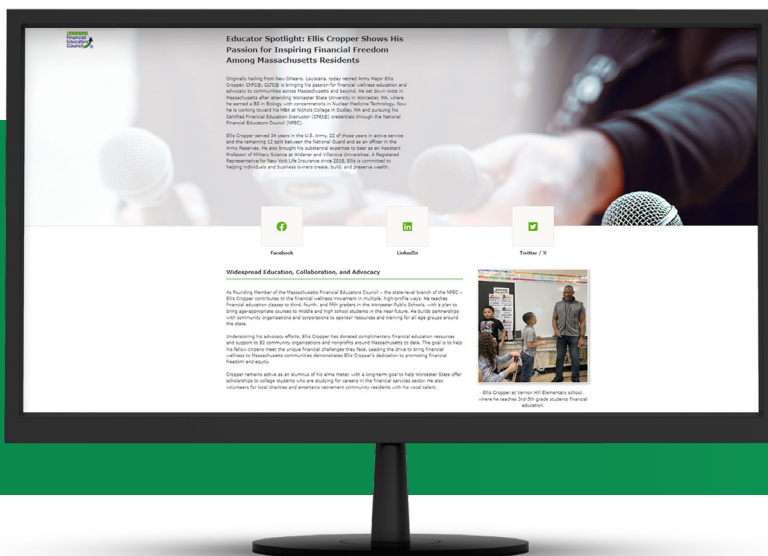
LEADERSHIP & ADVISORY BOARD FEATURE



Financial Education Program Spotlight: Ellis Cropper

Ellis Cropper, the Founding Member of the Massachusetts Financial Educators Council, makes a number of outstanding, highly-visible contributions to the financial wellness movement. He teaches financial education classes to third, fourth, and fifth graders in the Worcester Public Schools, with a plan to bring age-appropriate courses to middle and high school students across the state.

Highlighting his advocacy efforts, Ellis Cropper has donated complimentary financial education resources and support to 82 community organizations and nonprofits around Massachusetts and has led several statewide campaigns to raise awareness about the importance of starting financial education at the elementary school level.



YouTube video featuring Ellis Cropper



948
Views



119
Likes

Campaign Details and Results

A featured spotlight of this program was emailed to the NFEC's list of 64,826 subscribers and garnered 19,533 impressions and 2,605 page visits in the first week.

A YouTube video featuring Ellis Cropper and his elementary school program earned 948 views and 119 likes in the first week.

Social media featuring the program garnered 1,422 impressions and 32 interactions.

Social media featuring the program



21,903
Impressions

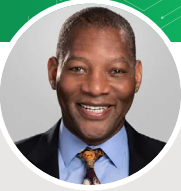


2,756
Interactions

Marketing Assets Development

The NFEC created several marketing and promotional assets to help Ellis Cropper highlight his professionalism and communicate his commendable efforts in delivering financial education programming. These resources showcase his dedication and the impact of his work in fostering financial literacy among young learners.

ELLIS CROPPER



Ellis Cropper contributes to the financial wellness movement in multiple, high-profile ways. He teaches financial education classes at the elementary school level, leads advocacy campaigns that promote youth financial education, and was the Founding Member of the Massachusetts Financial Educators Council.

Ellis Cropper served 34 years in the U.S. Army and also brought his substantial expertise to bear as an Assistant Professor of Military Science at Widener and Villanova Universities. A Registered Representative for New York Life Insurance since 2018, Ellis – also a ChFC® and CLTC® – is committed to helping individuals and families work toward greater financial health.

Instead of retiring, Ellis has committed himself to making a positive impact in the community among people of all ages with a focus on economic empowerment through financial education.

Ellis's mission stems from his belief that for people of all ages and socioeconomic levels, financial education is the key to addressing underlying money challenges – which in turn unlocks the door to financial independence and financial freedom.

Ellis also has earned designation as a Certified Financial Education Instructor (CFEI), proving his ability to teach financial literacy coursework and exceed standards set by the Framework for Teaching Personal Finance.



MISSION:

Financial education is key to financial independence and freedom.



Areas of Expertise

- Elementary School Financial Education
- Parental Involvement in Youth Financial Education
- How Kids' Financial Behaviors Form
- How to Engage Elementary Students in Financial Education Programming
- Kids' Financial Literacy Methodologies
- Topics to Include in Youth Programs



ABOUT ELLIS

Retired Army Major Ellis Cropper, ChFC®, CLTC®, brings his passion for financial wellness education to bear at the community level all across the Bay State.

Cropper conducts advocacy and sponsorships to raise financial wellness and capability. He sponsors the annual National Financial Literacy Test across Massachusetts to gather accurate data on current financial wellness in the state. Ellis also leads the Financial Educators Day Awards each April to recognize excellent financial educators who are making a real difference in people's lives.

Our Services

- ➔ **Kids' Financial Education**
Age-appropriate, scaffolded, fun, and engaging instruction for students in elementary through middle school.
- ➔ **Resource Donations**
Complimentary financial wellness and advocacy resources for schools, community organizations, and nonprofits.
- ➔ **Collaboration**
Forging strong partnerships with community groups and corporations to sponsor financial education training for all age groups.
- ➔ **Turnkey Package**
Resources and training on how to build a successful financial education program from the ground up.



Community Champion

Ellis Cropper is the founding member of the Massachusetts Financial Educators Council's Advisory Board. With proficiency and compassion, he demonstrates a strong commitment to creating opportunities for lower socioeconomic and underserved communities in the state.

As a financial professional for New York Life, Ellis is an expert in the different types of life insurance and the power of these tools in people's personal financial planning.

Financial education is real-life learning that makes a true difference – not only raising financial awareness, but helping people achieve financial freedom.



FINANCIAL EDUCATOR ELLIS CROPPER



Retired Army Major Ellis Cropper (ChFC®, CLTC®, and CFEI®) has worked as a financial professional for New York Life since 2018. Cropper's rich background and passion for making a positive community impact have led him to found Financial Education Advocacy – an organization committed to helping people move toward financial freedom.

Ellis Cropper has successfully led financial education programs across Massachusetts that have delivered positive results in terms of content knowledge, behaviors, and measurable outcomes.

Book Your Financial Education Program Development Consultation

Contact Ellis Today

- ✉ Ellis@FinancialEducationAdvocacy.com
- 🌐 www.FinancialEducationAdvocacy.com

Brand Exposure, Media Features, & Online Positioning

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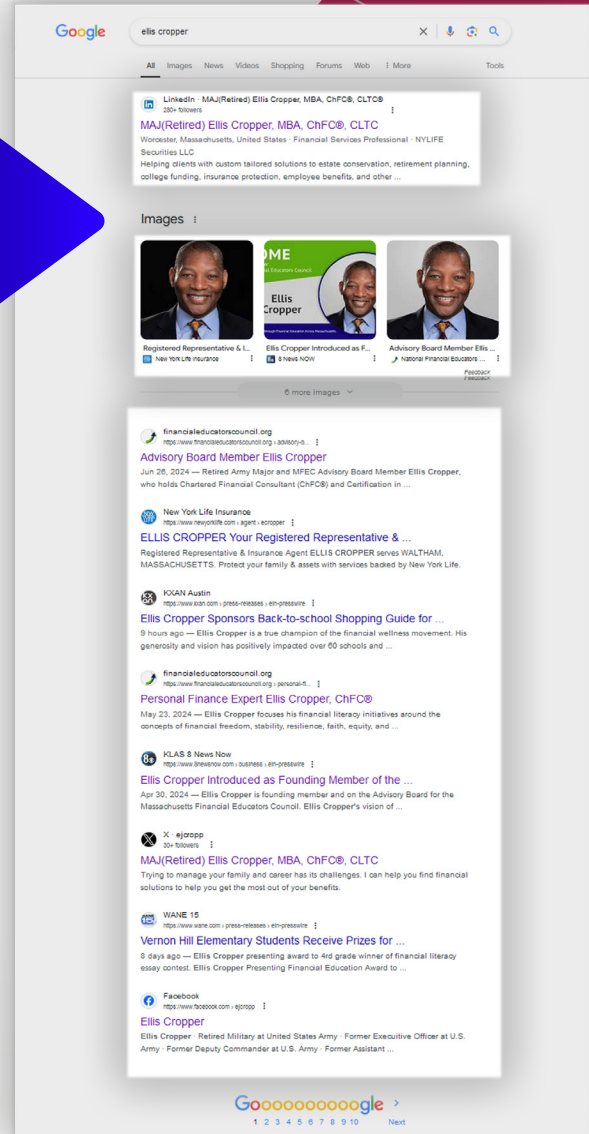
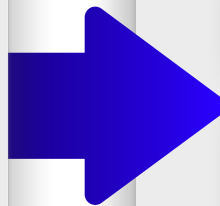
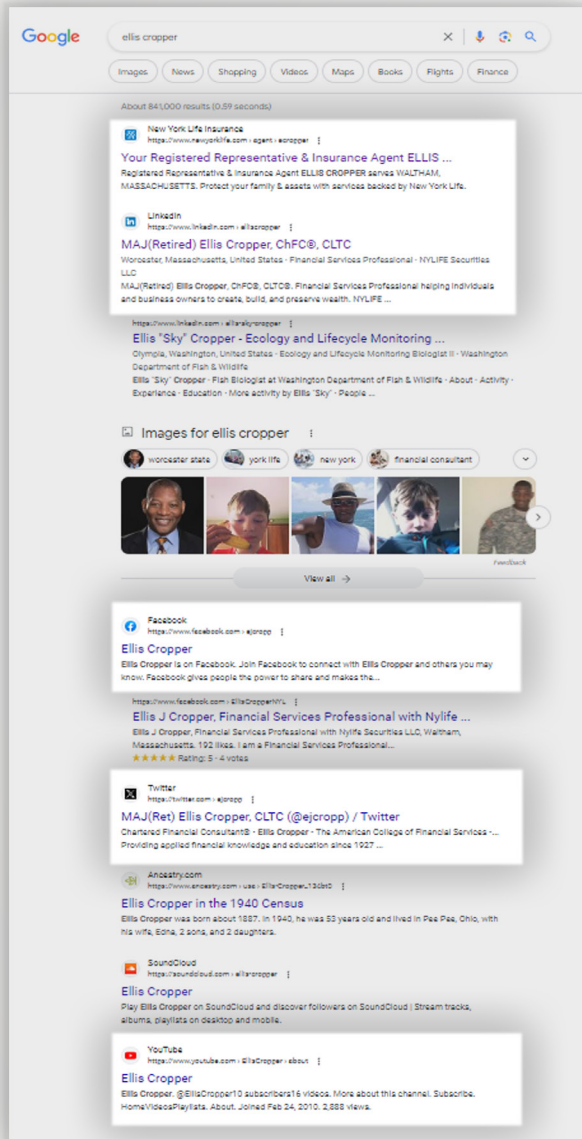


Google Search Organic (SEO)

BEFORE

1 search result in the top 20

from New York Life and 4 low-value social media profiles. Only 1 of these search results highlighted his professional endeavors.



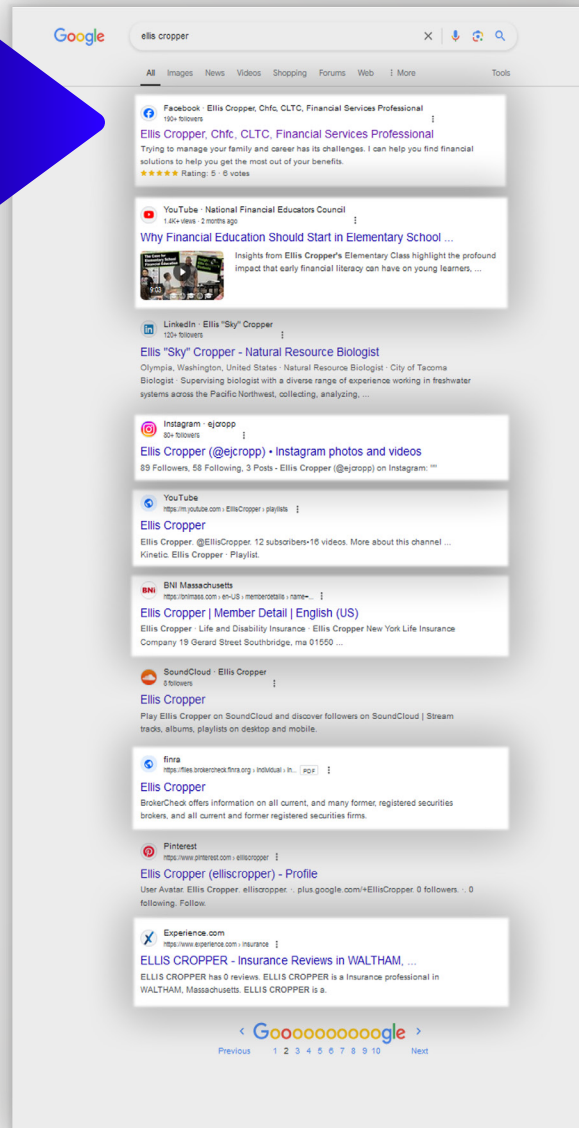
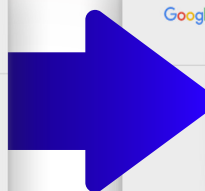
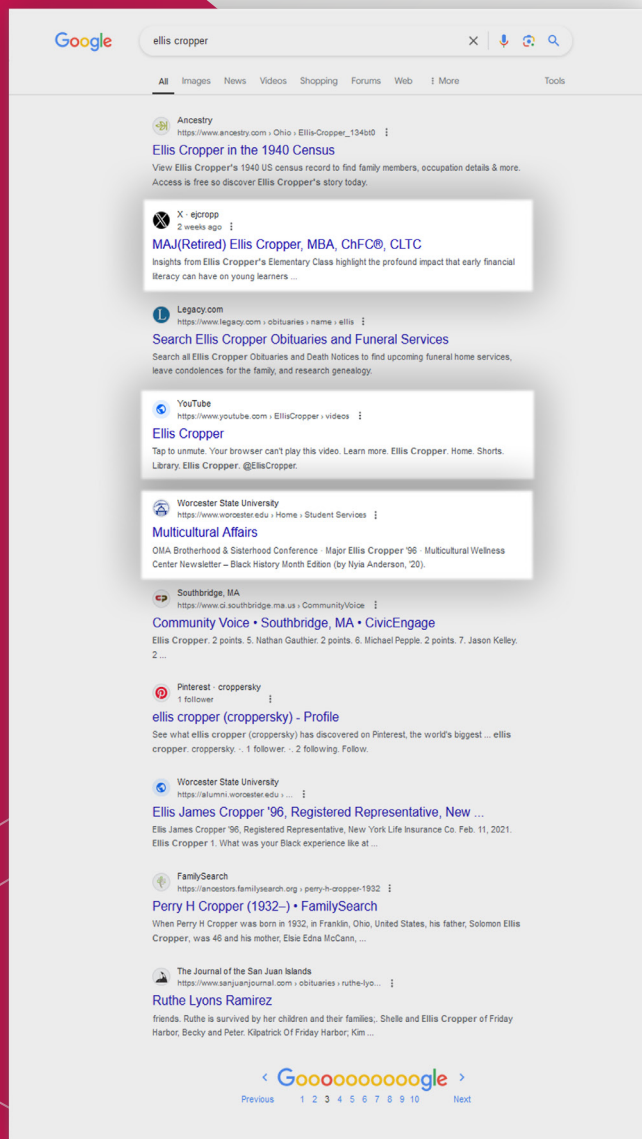
11 of the top 20 search results.

These results include 3 NFEC feature webpages, 2 news features, 4 social media profiles, and 1 New York Life feature.

AFTER

Google Search Organic (SEO) cont.

BEFORE

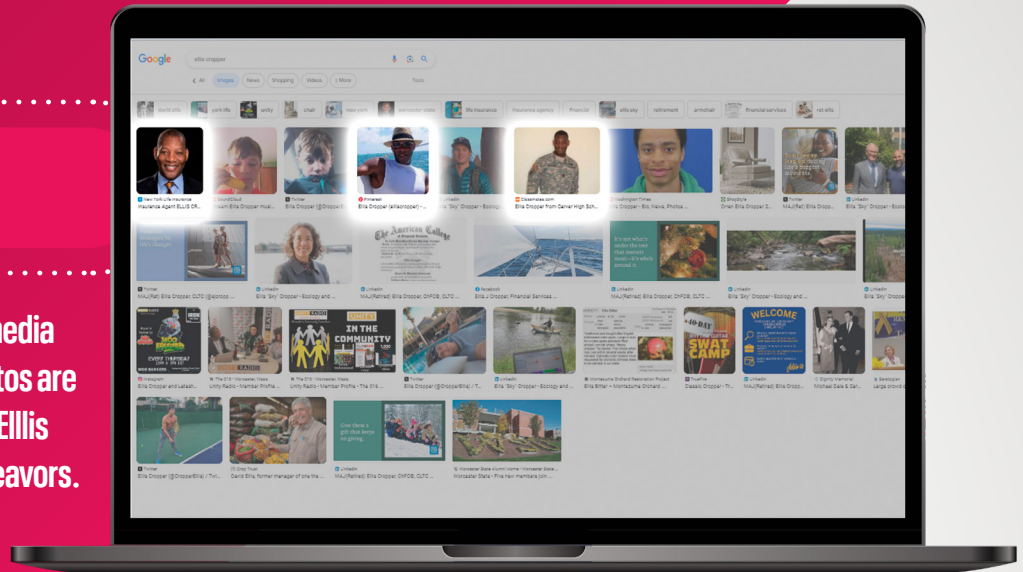


AFTER

Google Image Search (SEO)

BEFORE

Only 3 images from social media accounts appear. Most photos are older and only 1 highlighted Ellis Cropper's professional endeavors.



AFTER

13 images appear including multiple personal images and infographics that highlight Ellis Cropper's leadership, community service, and expertise in the financial space.



Emails to NFEC Targeted Database

The NFEC featured Ellis as the Founding Member of the Massachusetts Financial Educators Council and his program spotlight. These high-profile features garnered more than 40,000 impressions and over 3,700 page visits within the first week after sending the emails.



Ellis as the Founding Member of the Massachusetts Financial Educators Council

Within the first week of
sending emails:


40,000
Impressions


3,700
Page Visits

A featured spotlight of this
program was emailed to the
NFEC's list of 64,826 subscribers

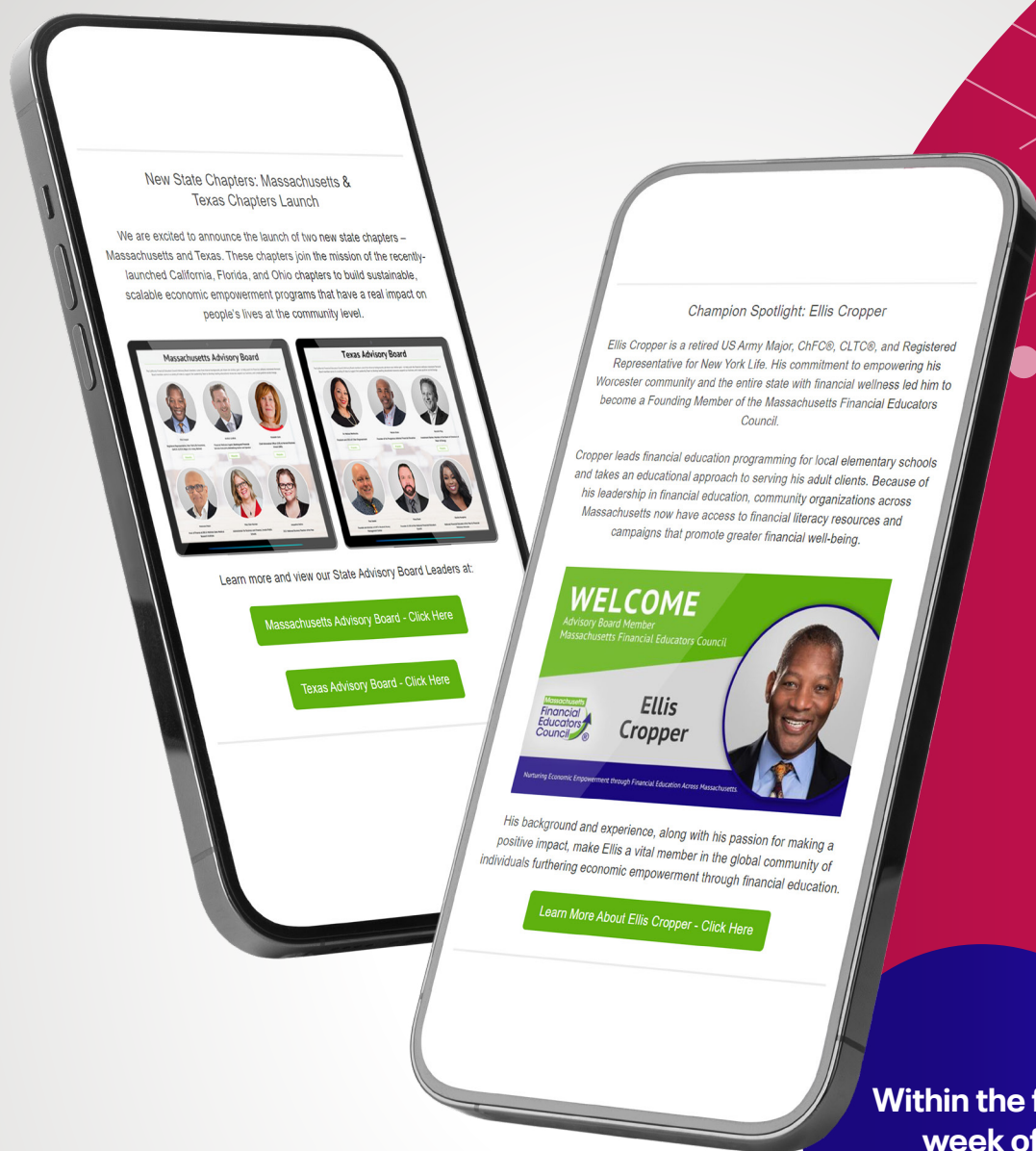
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Social media featuring the program garnered 1,422 impressions and 32 interactions.


19,533
Impressions


2,605
Page Visits



**The Massachusetts
Advisory Board
announcement was
emailed to the NFEC's
mail list of 64,636
subscribers**



22,156
Impressions



1,103
Page Visits

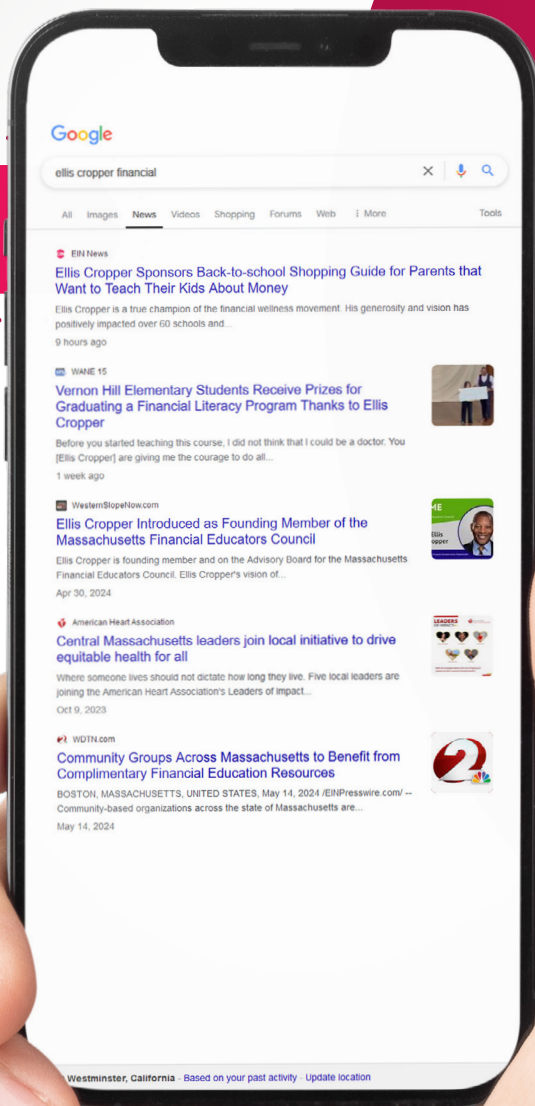
Google News Features

BEFORE

No news features (0)

AFTER

5 features in a Google news search that feature Ellis Cropper's leadership of financial literacy education across Massachusetts.



“

“Financial education is practical learning that makes a difference in helping people work toward greater financial wellness – which in turn connects with equity of opportunity and social justice.

- Ellis Cropper as quoted on Fox2 Now

”

FOX2 now

Media Pickup & Features

Throughout the campaign, the NFEC issued press releases and reached out directly to media outlets, influencers, and reporters via email. This outreach helped elevate awareness of the campaign and attracted people passionate about participating and beneficiary organizations interested in implementing financial wellness programming.

As a result of the press releases, Ellis was featured online through 484 publications, garnering 9,171 views and 1,229 engagements.



484
publications



9,171
views



1,229
engagements



Seeking Alpha^α



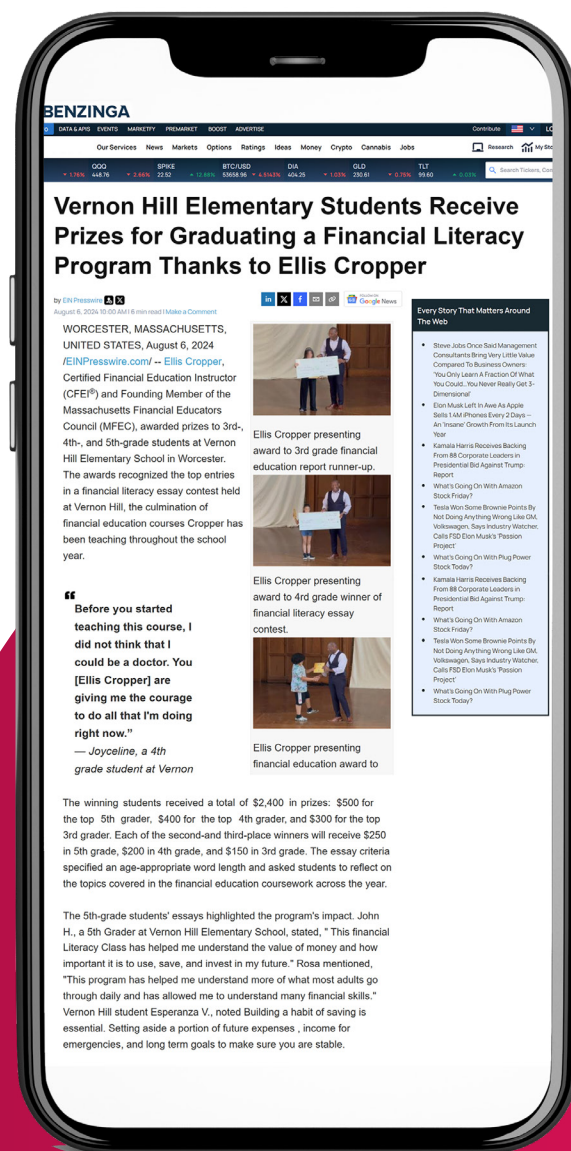
Influencer List Outreach

With media releases, the NFEC emails influencers, media outlets, and publications to help extend the reach of the messaging. Included on this page is a partial list of the influencers, outlets, and publications that received these emails.

Partial list of influencers who received communications:

NerdWallet Internet Blog
CNBC Online Internet Cable Network
Squawk Box – CNBC Cable Network Cable Network Show
Wall Street Journal Daily Newspaper
CNBC Cable Network
MarketWatch Internet Magazine – Online Only
Forbes Online Internet Magazine
Bankrate Internet Magazine – Online Only
Business Insider Internet Magazine – Online Only
Penny Hoarder Internet Blog
Bloomberg News News Service/Syndicate
Forbes Advisor Internet Magazine – Online Only
grow Internet Magazine – Online Only
Mad Money with Jim Cramer – CNBC Cable Network Cable Network Show
Money Internet Magazine – Online Only
Motley Fool Internet Magazine – Online Only
U.S. News & World Report Internet Magazine – Online Only
AARP The Magazine Magazine
CNBC Make It Internet Magazine – Online Only
CNET Internet Magazine – Online Only
Forbes Magazine
Investopedia Internet Magazine – Online Only
Kiplinger Magazine
Kiplinger's Personal Finance Magazine
New York Times Daily Newspaper

Total Reach:
1,324
INFLUENCERS



Social Media Promotions

Announcements of Ellis Cropper's leadership and involvement were posted on the NFEC's social media accounts: LinkedIn, X (formerly Twitter), Facebook, and Instagram.

March 7, 2024 post results: 485 Impressions and 36 Engagements.

January 24, 2024 post results: 382 Impressions and 23 Engagements.



August 15, 2024 post results: 429 Impressions and 32 Engagements.



CEO Social Media Post

The NFEC's CEO, Vince Shorb, highlighted Ellis Cropper's program for elementary students, recognizing it as a model for best practices in financial education programming. He also included a link to a YouTube video that featured Ellis's elementary school financial literacy program, showcasing the impact and effectiveness of the initiative.



4,029
Followers

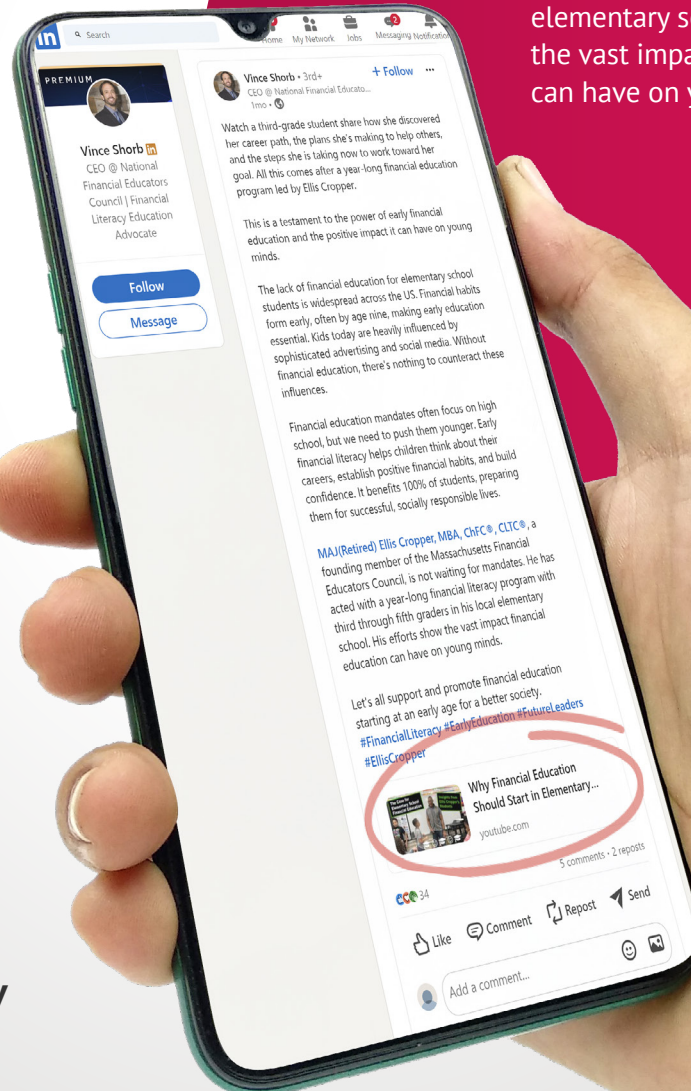


1,424
Impressions



32
Reactions

The post led to conversations about Ellis's efforts and elementary school program on our weekly client calls with about 25 participants.



“

MAJ (Retired) Ellis Cropper, MBA, ChFC®, CLTC®, a founding member of the Massachusetts Financial Educators Council, is not waiting for mandates. He has acted with a year-long financial literacy program with third through fifth graders in his local elementary school. His efforts show the vast impact financial education can have on young minds.”

”

Paid Google Search Ads & Remarketing Ads

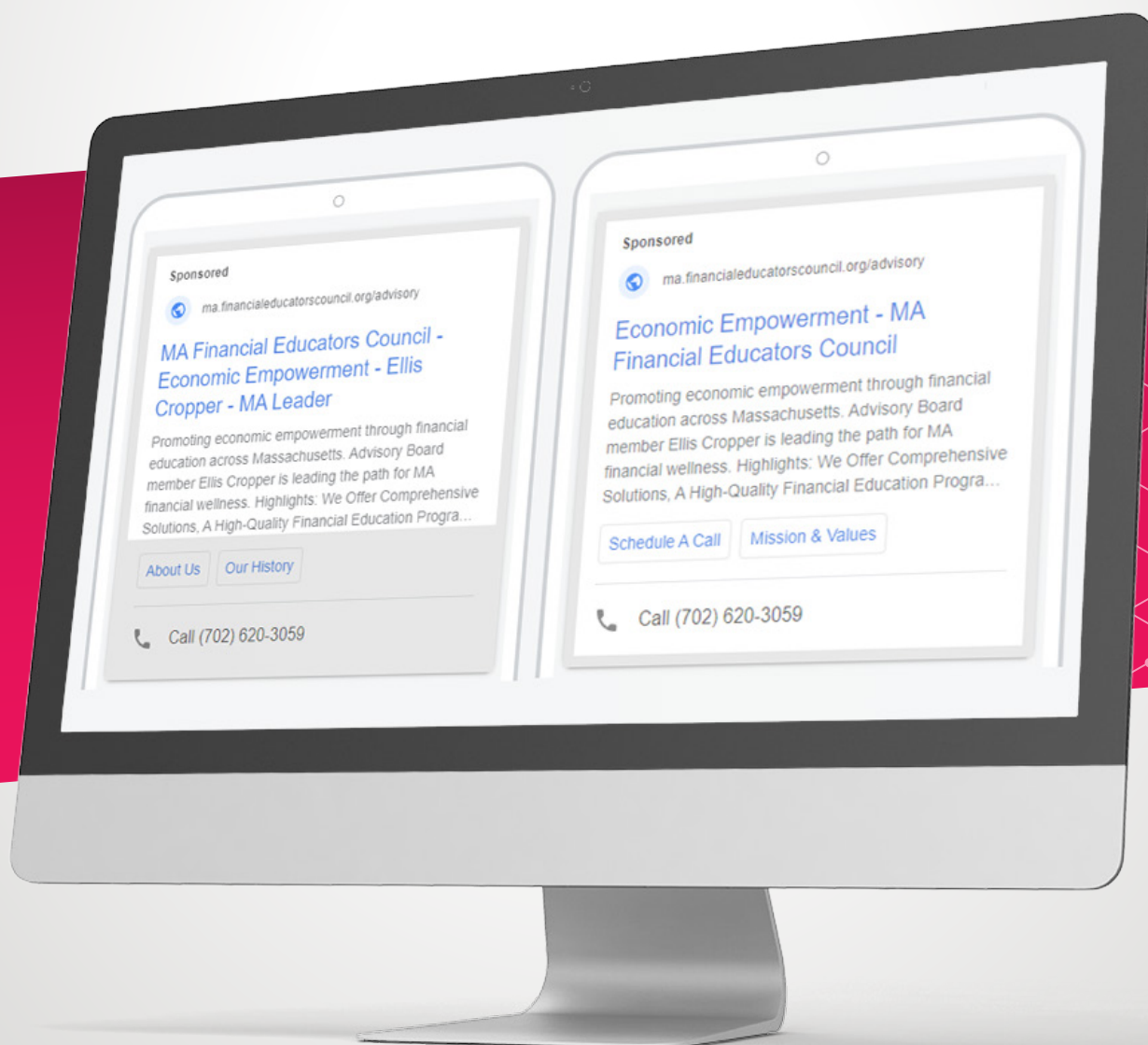
The NFEC conducted pay-per-click marketing campaigns that targeted people in Massachusetts and previous visitors to the Massachusetts Financial Educators Council website. Many of the paid ads garnered first positioning placement on terms like “Massachusetts Financial Education” and also “Ellis Cropper.” Paid ads and remarketing directed visitors to pages that featured Ellis Cropper.



381
Engagements



52,277
Impressions



Financial Education Events & Educational Promotions

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Statewide Financial Literacy Test

Ellis Cropper, Founding Member of the Massachusetts Financial Educators Council, spearheaded the NFEC's National Financial Literacy Test across Massachusetts. The objective was to gather accurate data about how the state compares with the rest of the country in terms of financial capabilities and leverage the data to garner media attention highlighting the need for financial education.

Massachusetts Test Results

Results of the National Financial Literacy Test in Massachusetts were just released. Among 1,462 teens aged 15-18 who took the assessment, a proportion of 56.98% achieved a passing score (70% or higher). However, the average score among this age group was 67.83% – just short of passing.

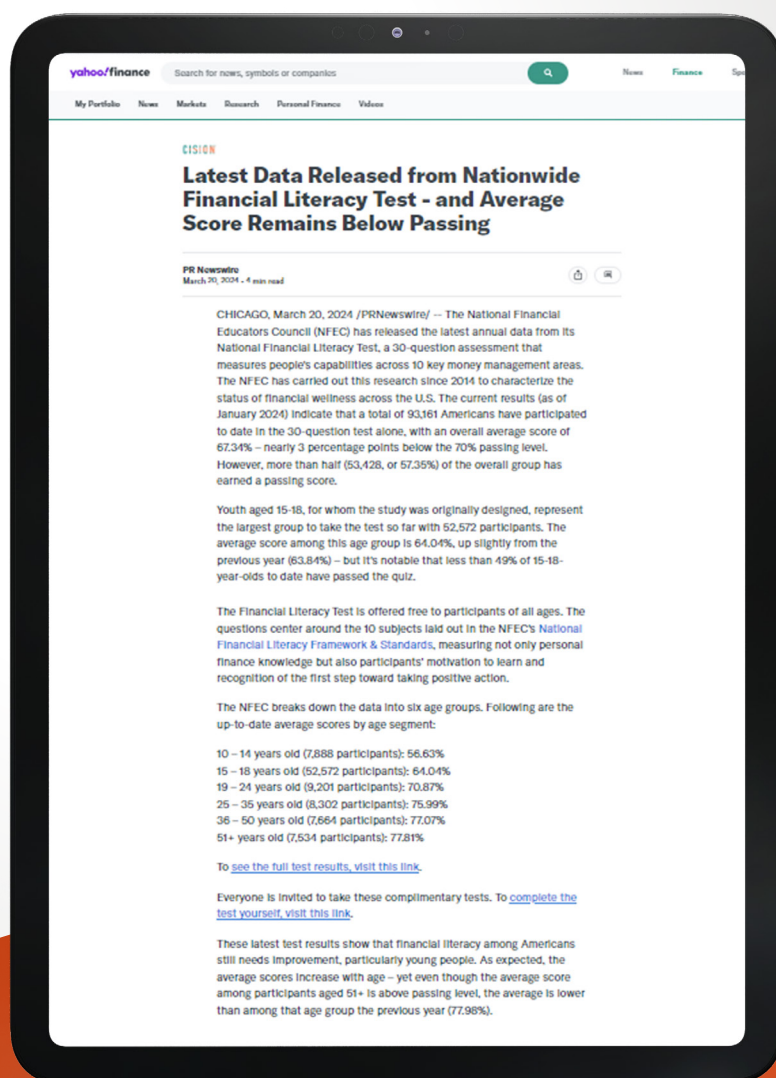
For comparison, the nationwide average score for 15-18-year-olds – among the 52,572 total participants from this age group who have completed the test to date – is 64.04%. Thus Massachusetts teenagers on average rank almost 4 percentage points higher than youth from the rest of the U.S. on this important evaluation.

Campaign Details and Results

The NFEC leveraged their National Financial Literacy Test with results from over 160,000 users nationwide to compare Massachusetts results.

Ellis Cropper promoted the financial literacy test across Massachusetts and had 1,462 participants between the ages of 15 and 18 complete the 30-question test.

Press releases were issued to individual journalists, industry newswires, and the top search engines with the most notable postings appearing in [Yahoo Finance](#) and the [Boston Examiner](#).



Back-to-School Campaign

August marks National Back-to-School Month and the Massachusetts Financial Educators Council, supported by Ellis Cropper, launched a campaign to provide free resources for parents to teach their children vital money management skills often missing from school curricula.

Resources were made available for schools, nonprofits, community groups, and parents to leverage as teachable moments for kids' financial education. The resources include a list of common back-to-school shopping needs, a shopping budget worksheet, and a planning guide. Additionally, tips for parents on how to use back-to-school shopping as a financial teaching moment are provided. These downloadable tools and activities aim to enhance financial literacy among students of all ages



Campaign Details and Results

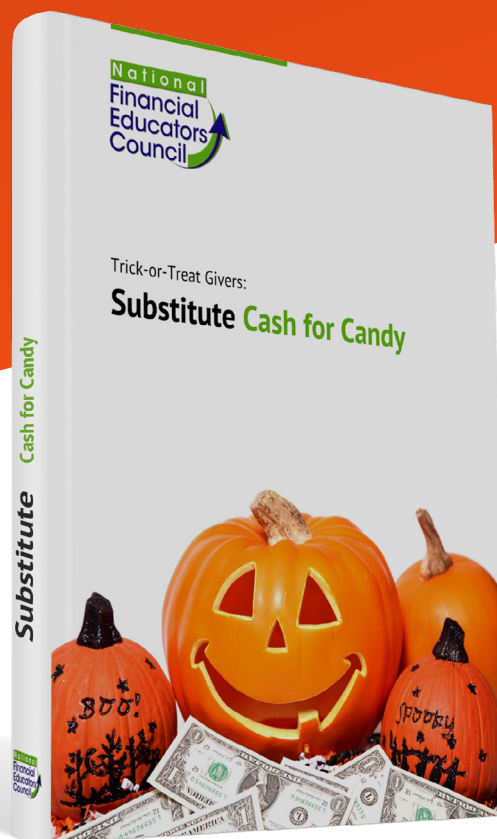
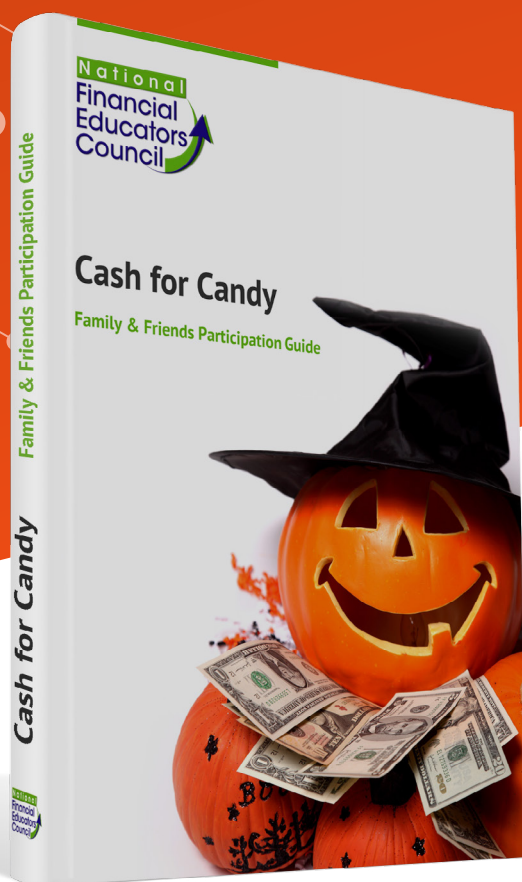
NFEC marketing garnered 21,221 impressions and 3,664 visits.

Press releases were sent through to individual journalists, industry newswires, and top search engines, with the most notable postings appearing at [Education News Today](#), [Today in Finance](#), and [NBC 22 Chicopee, Massachusetts](#).

Cash for Candy Campaign

Ellis Cropper sponsored the Cash for Candy campaign across Massachusetts. This campaign encourages parents to promote their kids' physical health and financial health at the same time.

Parents, treat-givers, and youth all can participate in the campaign. Parents can purchase candy back from their kids and use the buy-back as a teachable moment to provide children with key financial literacy lessons. Treat-givers can give out coins or cash instead of candy. Ellis provided guides for parents and treat-givers who wanted to participate.



Leadership & Award Campaigns

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Financial Educators Day

Financial Educators Day recognizes individuals dedicated to improving the financial capabilities of people in their communities. Celebrated on the last Friday of April, which is Financial Literacy Month, this day honors educators who contribute positively to the financial literacy movement. Whether someone hosts a small workshop or leads a large-scale campaign, their efforts to enhance financial education are appreciated and acknowledged.

Thanks to Ellis Cropper's efforts in Massachusetts, those in the state who are helping advance the financial literacy movement received special recognition and additional promotions to highlight their contributions. This initiative has brought well-deserved attention to the tireless work of financial educators, reinforcing the importance of their role in fostering financial literacy within their communities across Massachusetts.



Curtis Chambers, Financial Coach

Award Recipients

The following individuals were recognized for their efforts in helping the citizens of Massachusetts work toward greater financial health:

Professor Carin Zinter is a business professor dedicated to empowering individuals with essential financial knowledge. She has worked to bridge the gap between theoretical financial concepts and practical application.

After 10 years in retail banking and management, Danielle Desmarais helps high school students and community members build a foundation of financial literacy skills and healthy money management.

Professor Sarah Brown Morrissey, M.Ed, M.C.J., has spent two decades empowering individuals to make informed financial decisions. Professor Morrissey has actively engaged with communities through outreach programs aimed at underserved populations while at the same time teaching at Everett High School.

Jessica Murry works at one of Leominster Credit Union's three high school-based branches and also teaches Banking Internship and Personal Finance to high school juniors and seniors.

Campaign Details and Results

NFEC marketing prior to the award garnered 23,982 impressions, and 1,191 visits.

Press releases were sent to individual journalists, industry newswires, and the top search engines, with the most notable postings appearing at [Massachusetts Business Journal](#), [Bay State Times](#), and [WWLP 22 News MA](#).

The NFEC sent physical awards to five individuals with deserving applications in Massachusetts.

Community Champion Award

The Financial Education Community Champion Award recognizes outstanding individuals or organizations dedicated to promoting financial literacy and empowerment within their communities. This award celebrates the high-impact efforts of those who go above and beyond to educate and inspire others toward achieving financial wellness.

Craig Dottin, Principal, and Kelly Boyd, Assistant Principal at Vernon Hill Elementary School have been awarded the Financial Education Community Champion Award to recognize their outstanding leadership in bringing a standalone financial literacy program led by Ellis Cropper to third-, fourth-, and fifth-grade students.



Campaign Details and Results

Plaques were designed and sent to Ellis to present to Craig Dottin and Kelly Boyd.

Ellis Cropper presented awards to Craig and Kelly in front of hundreds of students, parents, and faculty.

A spotlight webpage was created to feature the award ceremony and to recognize all stakeholders involved.

Student Achievement Awards & Recognition

Ellis Cropper, ChFC®, CLTC, and Founding Member of the Massachusetts Financial Educators Council, led a ceremony that awarded prizes to third-, fourth-, and fifth-grade students at Vernon Hill Elementary School. The awards recognized top entries in a financial literacy essay contest after the culmination of financial education courses Cropper had been teaching throughout the school year.

A total of \$2,400 in prizes was awarded to the winning entries. Funding for the awards was provided by Ellis Cropper, the Massachusetts Financial Educators Council, and Worcester County DA Joseph D. Early, Jr. Essay criteria specified an age-appropriate word length and asked students to reflect on the topics covered in the financial education coursework across the year.

Background & Course Impact

Students completed a year-long course led by Ellis Cropper, a Certified Financial Education Instructor (CFEI®). This program taught students personal finance topics that ranged from career planning and entrepreneurship to developing positive financial habits and understanding the cost of living. The course was capped off with a writing contest so students could synthesize what they learned into an article.

Campaign Details and Results

The educational materials used for the courses were sourced from the NFEC Elementary School Curriculum.

The NFEC provided banner-sized checks for use in the ceremony and contributed half the amount of the awards to 9 deserving students.

A featured spotlight of this program was emailed to the NFEC mail list and garnered 22,504 impressions and 1,087 visits.

Press releases were issued to individual journalists, industry newswires, and the top search engines with the most notable postings appearing at the [Boston Examiner](#), [Massachusetts Business Journal](#), and the [Bay State Times](#).

A related social media feature garnered 1,345 impressions and 23 interactions.

“

Before you started teaching this course, I did not think that I could be a doctor, but now I know that if I just try, I can be a doctor. You are giving me the courage to do all that I'm doing right now.”
Joyceline, 5th-grade Vernon Hill Elementary student

”

Student Achievement Awards & Recognition





Conclusion

To Ellis

Thank you for your generous support and leadership of the Massachusetts Financial Educators Council. Your contributions have been instrumental in building a campaign that is making a meaningful impact across Massachusetts and advancing the financial education movement.

As a Certified B Corporation®, we are deeply committed to all our stakeholders – local citizens, beneficiary groups, and our financial industry partners. Our goal is to create a positive outcome for everyone involved, and the benefits we offer are our way of expressing our gratitude for your partnership.

We look forward to continuing to work together to encourage financial education throughout Massachusetts. Thank you once again for your ongoing efforts and support!

Thank you!