

State Advisory
Board Impact Report
James Chang



Contents

Introduction	3
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Social Impact	4
Donations	5
Advocacy	5

Brand Assets	6
State Webpage Features	7
National Site Webpage Features	8
Advisory Board Inclusion	9

Exposure	10
Google Search Organic (SEO)	11
Google Image Search (SEO)	12
Media	14
Social Media	15
State Launch Emails	16

Conclusion	17
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Introduction

Thank you, James Chang!

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 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 help us meet the social impact objectives established through this campaign.

Social Impact

What's in this section

Donations	5
Advocacy	5



Donations

Your generous sponsorship funds the financial empowerment of your 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.

We have provided resources to 143 groups in California.

Advocacy

The NFEC leads a comprehensive advocacy campaign to encourage focused attention on the financial well-being of 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.

Advocacy campaigns are scheduled to start in two months.



Brand Assets

What's in this section

State Webpage Features	7
National Site Webpage Features	8
Advisory Board Inclusion	9



State Webpage Features

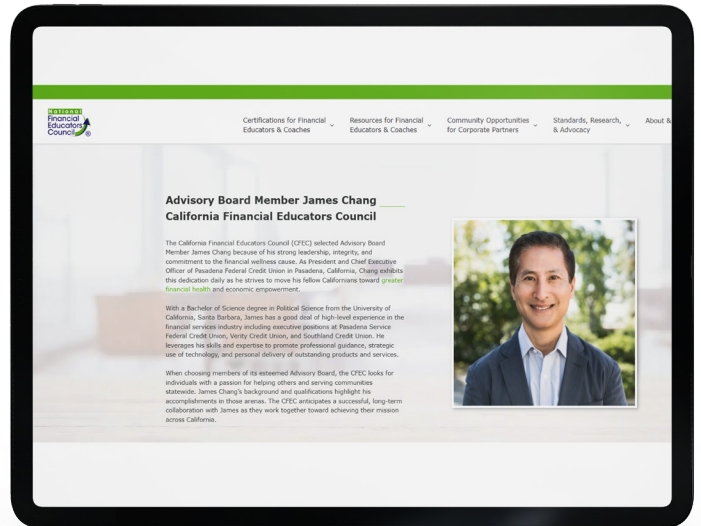
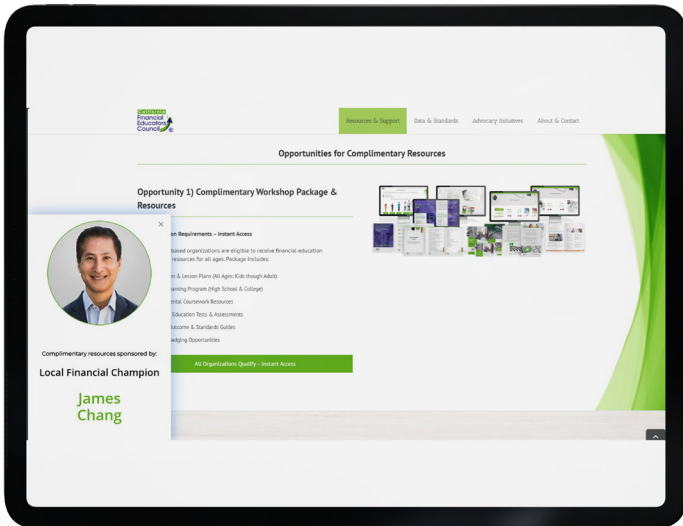
Prominent features highlighting your leadership of this campaign were posted across the state chapter website.



MAIN PAGE FEATURE

DONATION PAGE FEATURE

BOARD PAGE

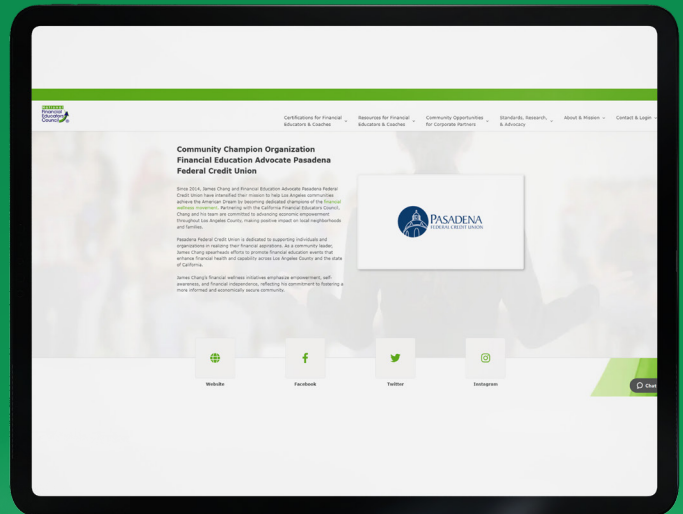
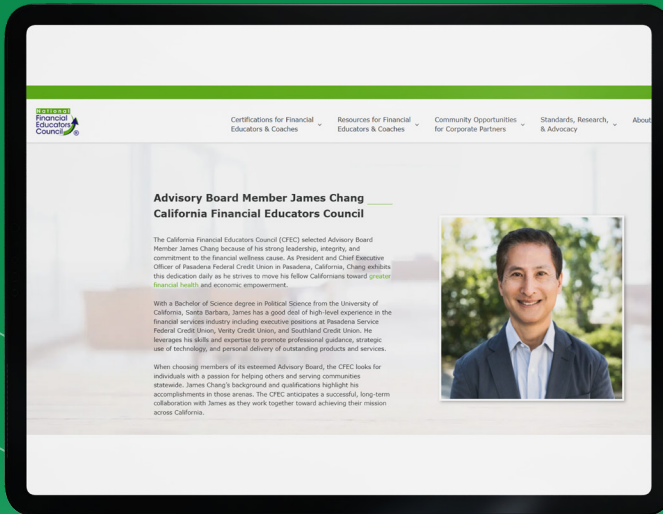


National Site Webpage Features

Prominent features highlighting your leadership of this campaign were posted across the NFEC national website.

SOCIAL LEADERSHIP FEATURE

COMPANY FEATURE



EXPERT ARTICLE FEATURE



Advisory Board Inclusion

Inclusion in our state board alongside other prominent leaders in the community.



James Chang

President and
CEO of Pasadena
Federal Credit
Union



Larry Dicke

CalChamber of
Commerce, Chief
Financial Officer,
Retired 2022



Veselina Dinova

Haas School of
Business UC Berkeley,
Executive MBA
Professor



**Carolyn
Campbell**

Emerging Capital
Partners, Managing
Partner and COO



Sonja Strzoda

Financial Services
Executive &
Nonprofit Board
Professional



Sam X Renick

Internationally
Recognized
Financial Literacy
Pioneer



Rodney Balbuena

Managing Director,
SageView Advisory
Group



Trevor Stoll

National Financial
Educators Council,
Director of
Operations

Exposure

What's in this section

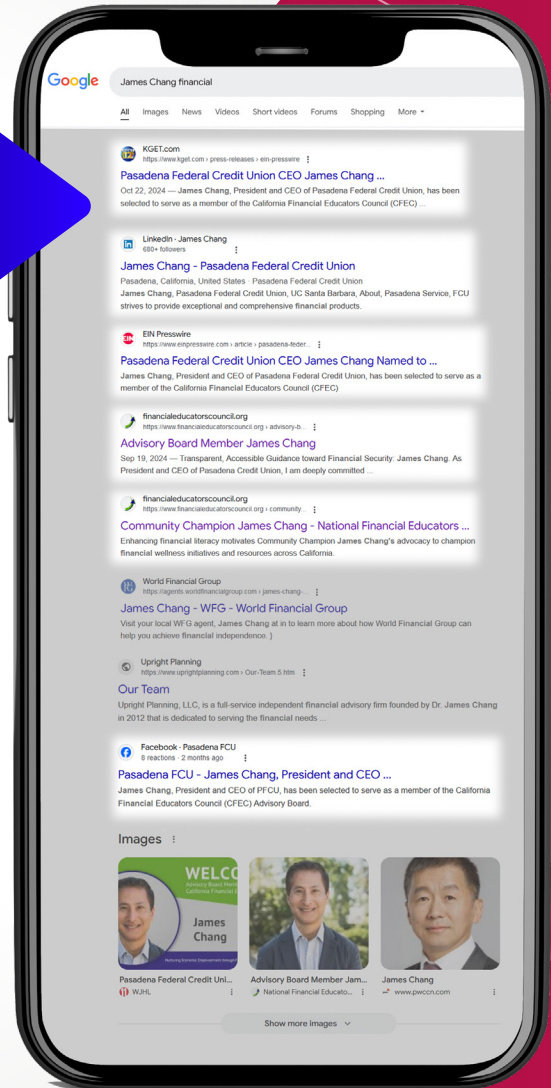
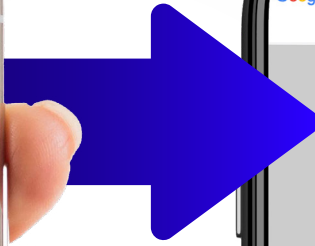
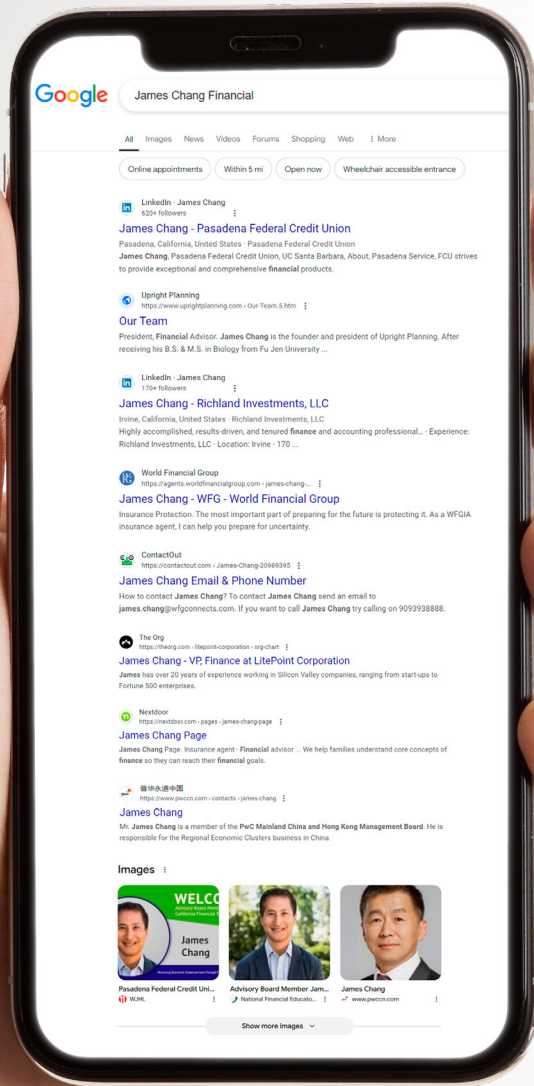
Google Search Organic (SEO)	11
Google Image Search (SEO)	12
Media	14
Social Media	15
State Launch Emails	16



Google Search Organic (SEO)

BEFORE

1 search results in the top 10 and no images.
Only one social media account is displayed.



7 of the top **10** search results plus **2** images.

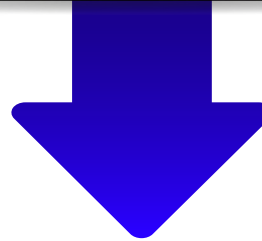
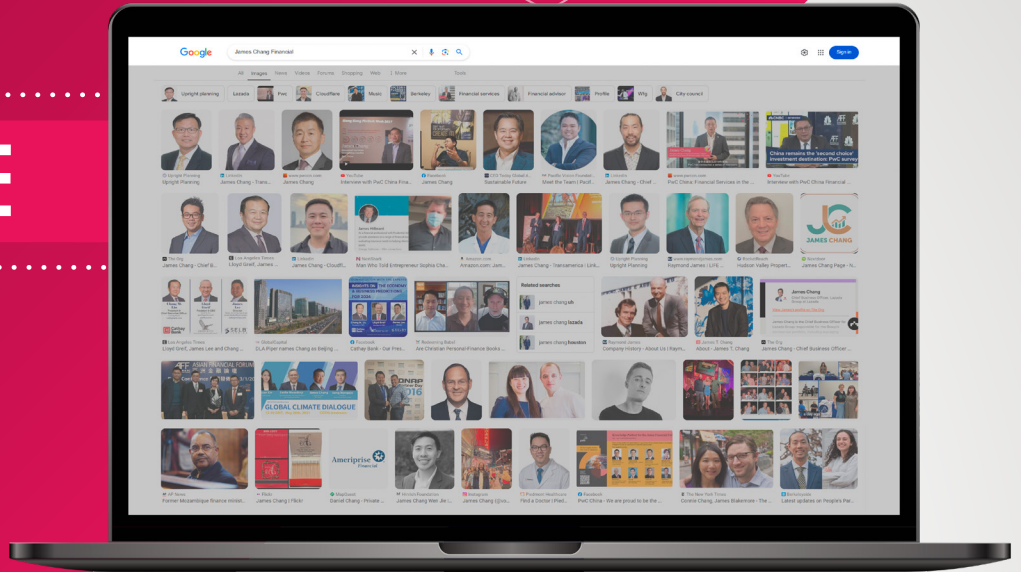
These results include feature webpages and news, all on page 1 of the Google search.

AFTER

Google Image Search (SEO)

BEFORE

No images appear.



AFTER

4 images appear including multiple personal and business images.





“

I've made a broad commitment to empower people toward reaching greater financial security at the community level and to support my fellow Californians to achieve financial wellness in both current and future economic conditions.

~ James Chang

”

Media



32
publications



378
views

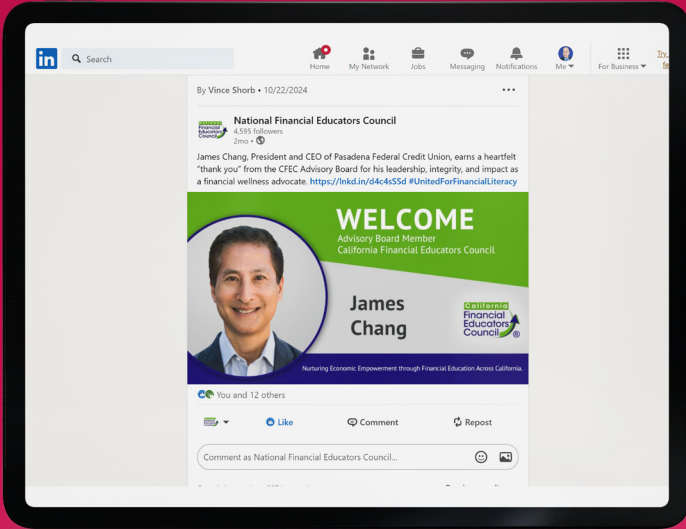


19
engagements



Social Media

Announcements of your leadership and involvement were posted on the NFECE's social media accounts – LinkedIn, X (formerly Twitter), Facebook, and Instagram.



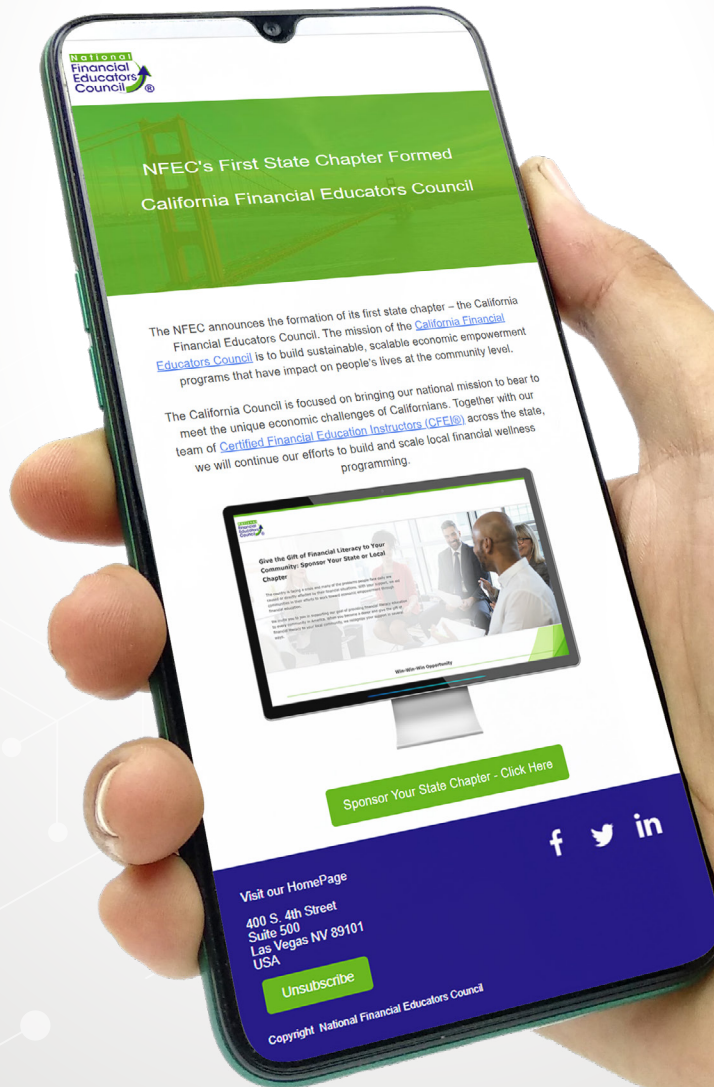
State Launch Emails



45,928
Targeted Emails Sent

19,483
Impressions

3,457
Visits





Conclusion

We greatly appreciate your generous support. The campaign benefits to you are our way of saying, “Thank you.”

As a Certified B Corporation, we have a commitment to all our stakeholders: local citizens, beneficiary groups, and our financial industry partners. We remain committed to each stakeholder to ensure a win for all parties involved.

If you want to change or modify your benefits package, just let us know. The benefits are customized to meet your needs. From top-of-funnel awareness through client acquisition and loyalty – the benefits we offer deliver true value to your business and produce measurable results.

Thank you!