



Council of Financial Educators

AN IRS-APPROVED 501(C)(3) NON-PROFIT ORGANIZATION



OUR MISSION

The Council of Financial Educators

is an IRS-approved 501(c)(3) non-profit organization committed to providing the public with the knowledge needed to confidently navigate the ever-changing retirement landscape.

Understanding that millions of people have financial questions, as well as a unique set of circumstances and retirement needs, we offer educational classes and resources to the public to address these needs.



COFE AND STEP2SUCCESS

**COFE is proud to partner with
Step2Success Financial Marketing
to provide first-class marketing
for your courses.**

- Both COFE and S2S aim to foster positive, lasting relationships
- Dedicated COFE/S2S team working to ensure your success
- Seamless transfer of information
- Aligned processes and procedures
- Everyone in the loop and on the same page



STEP2SUCCESS
FINANCIAL MARKETING

The logo features a stylized blue icon on the left, resembling a checkmark or a graph line. To its right, the text "STEP2SUCCESS" is written in a bold, italicized, blue sans-serif font. Below this, the words "FINANCIAL MARKETING" are written in a smaller, blue sans-serif font, also italicized. The entire logo is centered horizontally. A solid blue horizontal bar spans the bottom of the image.



STEP2SUCCESS FINANCIAL MARKETING

S2S provides proven, effective marketing solutions to help financial advisors reach, capture and retain highly-qualified clients.

- Owner, Brian Stepan, is a licensed financial advisor with over 30 years experience, as well as an Air Force veteran
- Work exclusively in the financial services industry
- Pioneers of the educational business model
- Extensive experience, knowledge and best practices to help you succeed
- Committed to long-term marketing partnerships



BENEFITS OF COFE MEMBERSHIP



NON-PROFIT MEMBER STATUS

Benefit from being a COFE Non-Profit Member/Instructor

- **Credibility** - Increase your professional credibility and gain trust
- **Community Commitment** - Demonstrate your commitment to your local community by providing Adult Education classes
- **Marketing** - Use your membership – including our logo, mission statement, and member seal – to brand your courses and services
- **Access** - Gain access to coveted teaching venues, and organizations



ONLINE PRESENCE

As a COFE Member, you will have an online presence on the COFE website, including:

- Your Instructor biography and profile picture
- A detailed listing for each of your COFE classes
- A registration page for each of your COFE classes



EDUCATIONAL WORKSHOP PROGRAMS

As a COFE Member, you will have access to our Educational Workshop Programs, including:

- *Social Security: Know Your Options*
- *Medicare: Know Your Options*
- *Maximize Your Social Security and Minimize Your Taxes*
- *Retirement Income Planning*
- *Tax Planning For Retirement*
- *Tax and Income Planning Strategies*
- *Understanding Your IRA /401k Options*
- *Rolling Over Your 401k Options*
- *Create a Personal Income and Pension*
- *Women and Wealth*



TURNKEY PROGRAMS

Each COFE Educational Workshop Program is **TURNKEY** and gives you access to:

- A professionally-designed workshop invitation
- A scripted PowerPoint presentation
- Printed Student Workbooks
- Student Handouts, including:
 - An Income Needs Worksheet
 - A Course Evaluation Form
 - An Appointment Form



TEACH YOUR OWN MATERIAL

Teach your own classes

- COFE welcomes you to submit your own course presentation for approval, allowing you to teach the courses you are currently using.
- S2S will custom design a course invitation based on your class content and/or existing marketing materials.



COURSE SELECTION AND PLANNING

S2S helps you determine the best course(s) and schedule to meet your goals and marketing budget.

- Target your ideal prospects with the right course topic
- Access historic and current nationwide marketing metrics for all classes
- Strategic planning and class scheduling
- Best practices to ensure that your classes succeed



TEACHING VENUES

COFE and S2S provide tools and services to help you secure an appropriate teaching venue.

- A COFE Membership Certificate showing that you are a Member in Good Standing
- A copy of COFE's 501(c)(3) Certificate
- COFE overview literature to share with potential venues
- S2S assistance in identifying appropriate teaching venues in your area
- Best practices for securing the venue



PROTECTED TERRITORIES

Benefit from having an exclusive, protected territory for your COFE classes

- One COFE territory consists of the 20,000 qualified prospects surrounding your teaching venue
- One COFE territory is included in your membership
- Additional territories are available
- Territories are defined by numerous factors, including: class topic, venue location, target age range, qualifying financial criteria, and area demographics/geographics
- One-on-one consultation with S2S to evaluate and define your territory



COURSE REGISTRATION SYSTEM

Our Course Registration System features:

- A dedicated, detailed online registration page for each of your COFE classes
- 24/7 Online registration
- 24/7 Phone registration
- Online payment and processing of tuition / class materials fees, if applicable



REAL-TIME REGISTRATION REPORTING

**COFE Members are kept up-to-date
on their course registrations with:**

- Email notifications for every registration
- 24/7 backend access to monitor registrations in real-time
- Detailed registration rosters available to view, download, and/or print on-demand



BEST PRACTICES

**COFE and S2S optimize your results
with proven best practices for:**

- Course Topic Selection
- Venue Selection and Contact
- Strategic Planning
- Class and Mail Scheduling
- Target Demographics
- Classroom Teaching Strategy
- Appointment Setting and Follow-up



CUSTOMER SERVICE

Customer Service is a top priority

- At COFE and S2S, our goal is to make the process of providing **financial education** as easy as possible for you
- Our job is to make **your** job easier
- “Special orders don’t upset us ...”
- COFE Instructors are valued and appreciated!



LOW MEMBERSHIP COST

COFE provides both value and customer service for the low membership fee of only **\$949** per year.

- The annual COFE membership fee is \$949
- One territory (20,000 qualified prospects) is included with your \$949 membership
- Additional territories of 20,000 qualified prospects can be purchased for **\$300** per territory
- Membership includes access to COFE's Turnkey Educational Workshop Programs
- Membership includes access to all of the COFE and S2S benefits and services in this presentation



COST SAVINGS

COFE membership helps you realize significant cost savings:

- **Postage Savings** - As a COFE member, you will save 16 cents per mail piece
 - Save \$1,600 on a 10,000-piece mailing
 - Save \$800 on a 5,000-piece mailing
- **Room Rental Fees** - Teaching venues often discount, or even waive, room rental fees for non-profit members
- **ROI** - The \$949 annual membership fee is often recouped within the first mailing



MARKETING COSTS

All-inclusive, non-profit mail pricing

- Pricing includes:
 - Design/copywriting, production, and printing
 - Premium Nielsen Income Producing Assets (IPA) mailing list
 - Non-profit postage
 - Consumer data privacy compliance
 - 24-hour phone registration system
- Quantity discounts are offered at 5,000, 7,500, 10,000, 15,000 and 20,000 pieces
- Typical quantities and COFE member pricing:
5,000 - 10,000 pieces = \$3500 - \$6700



COFE SCHOLARSHIP FUND

COFE is proud to grant scholarships to support students who are pursuing careers in financial disciplines.

- Annual COFE Scholarships to local seniors graduating from the Academy of Finance Program at an area high school.
- The COFE Scholarship Fund is funded by public, private, and member donations, as well as any excess from our tuition payment processing fee



WHAT'S NEXT?





CONTACT INFORMATION

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