



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®

A Mission Lived
to Benefit Society

A MISSION'S WORK TO EMPOWER AND UPLIFT SOCIETY

The American College of Financial Services continues to advance mission-minded work through scholarship, thought leadership, and philanthropic initiatives that democratize access to applied financial knowledge and uplift diverse, underrepresented communities.

Leading With Vision and Values

Since 1927, The American College of Financial Services has been proudly delivering high-quality, applied financial knowledge to the professionals entrusted with the public's financial wellbeing.

By leading with integrity and respect, taking accountability for our stewardship of the common good, and striving for excellence in lifelong learning, The College aims to advance the profession and its service to improved financial outcomes.



Dr. Solomon Huebner, College founder and pioneer of the modern-day financial services profession.



George Nichols III, 10th President and CEO and "one of ten people to watch in wealth management for 2021" according to WealthManagement.com.

Our Mission

WE PROVIDE APPLIED FINANCIAL KNOWLEDGE AND EDUCATION, PROMOTE LIFE-LONG LEARNING, AND ADVOCATE FOR ETHICAL STANDARDS FOR THE BENEFIT OF SOCIETY.

Benefitting Society Weaves Through Our Work

Benefitting society has deep underpinnings in applied financial knowledge and how it empowers a culturally- and occupationally-diverse nation to new careers, professional service, and a renewed relationship with money.

We live our mission through:

- Removing barriers to education through scholarships
- Research into gender and racial diversity and wealth-building issues
- Thought leadership that informs veterans, cultural communities, women in financial services, retirees, special needs families, and nonprofit professionals



OPENING AVENUES TO CAREER SUCCESS AND FINANCIAL SECURITY

The College believes that equitable access to applied financial knowledge can have an effervescent effect on communities and cultures, families and the business of financial services professionals.



Who Our Work Supports

We remain committed to identifying areas of need and devoting our intellect, ingenuity, and innovation to purposeful problem-solving that changes lives.

“For the benefit of society” means serving individuals often underserved and underrepresented in the traditional financial services relationship, as well as the professionals looking to transform the profession’s future.

WE WORK IN SERVICE TO:

- VETERANS, ACTIVE-DUTY MILITARY, AND THEIR SPOUSES
- CURRENT AND SOON-TO-BE RETIREES
- CULTURAL COMMUNITIES
- SPECIAL NEEDS FAMILIES
- GENDER DIVERSITY
- THE PROFESSION’S ETHICAL FRAMEWORK
- NONPROFIT PROFESSIONALS

Championing Causes and Constituencies in Need

SUPPORT VETERANS IN SEARCH OF CAREER PATHWAYS

200,000 veterans and their spouses transition into the civilian workforce each year.¹



DELIVER SPECIAL NEEDS KNOWLEDGE TO A LARGE AUDIENCE

Approximately **8.8 MILLION** families in the United States have at least one child under the age of 18 with a special healthcare need.⁶



EMPOWER BLACKS THROUGH FINANCIAL LITERACY AND LEADERSHIP



Blacks score **17%** worse in financial literacy knowledge than white adults.²

Only **3.2%** of senior leaders at U.S. companies are Black.³

FIND SOLUTIONS TO TODAY’S RETIREMENT CRISIS

The median family headed by a soon-to-be retiree has just **\$21,000** in retirement savings, with half of all families having **NO SAVINGS** at all.⁷



NARROW THE GENDER GAP IN FINANCIAL SERVICES

40% of total global wealth is held by women.⁴ Yet only **14%** of financial advisors are women.⁵



HELP HARNESS THE POWER OF PHILANTHROPY

87% of total philanthropic dollars in the U.S. come through personal donations.⁸



1 U.S. Government Accountability Office. Transitioning Service members: Information on Military Employment Service Centers. 6/17/19. 2 TIAA Institute. African American Personal Financial Knowledge. 11/19. 3 Coqual. Being Black in Corporate America. 2019. 4 Family Voices: National Center for Family and Professional Partnerships. 6/16. 5 Credit Suisse. 2018 Global Wealth Report. 2019. 6 The Wall Street Journal. Clients Want to Work With Female Advisors, and Firms Are Taking Notice. 8/14/19. 7 Family Voices: National Center for Family and Professional Partnerships. 6/16. 8 Economic Policy Institute. The State of American Retirement Savings. 12/19. 9 Fidelity Charitable. The Future of Philanthropy. 2016-2017.

ACHIEVING EXCELLENCE THROUGH SUSTAINABLE IMPACT

The College executes purposeful mission-based work through its Centers of Excellence. With the newly created Center for Economic Empowerment and Equality, The College will run seven centers that reflect a longstanding commitment to the advancement of professionalism and innovation in the industry, and by extension, increased financial security for all Americans.



THE AMERICAN COLLEGE
NEW YORK LIFE
**CENTER FOR
RETIREMENT INCOME**



THE AMERICAN COLLEGE
NORTHWESTERN MUTUAL
**GRANUM CENTER
FOR FINANCIAL SECURITY**



THE AMERICAN COLLEGE
PENN MUTUAL
**CENTER FOR
VETERANS AFFAIRS**



THE AMERICAN COLLEGE
CARY M. MAGUIRE
**CENTER FOR ETHICS
IN FINANCIAL SERVICES**



THE AMERICAN COLLEGE
STATE FARM®
**CENTER FOR WOMEN
IN FINANCIAL SERVICES**



THE AMERICAN COLLEGE
MASSMUTUAL
**CENTER FOR
SPECIAL NEEDS**



THE AMERICAN COLLEGE
**CENTER FOR
ECONOMIC EMPOWERMENT
AND EQUALITY**



EDUCATING AND EMPOWERING OUR NATION'S HEROES

Veterans and their spouses come from a culture of service and possess the skills necessary to transition into a rewarding career in financial services. They just need access to educational opportunities that can open avenues for success.

Since 2012, The College has awarded over **500 scholarships to veterans and their spouses across 46 states, two territories, five countries, and three continents.** Moving forward, The College intends to award 200 scholarships each year.

These veterans receive knowledge in financial services, leadership, and philanthropic planning – an education that can help jump start a valuable, and valued, career in the profession.



PROMOTING DIVERSITY AND UPLIFTING CULTURAL COMMUNITIES

The College’s work to empower cultural communities has had a tangible impact on professional diversity. We help foster a profession that looks more like the diverse nation it serves.

Preparing the Profession to Serve a Majority-Minority Nation

CONFERENCE OF AFRICAN AMERICAN FINANCIAL PROFESSIONALS

The College’s Conference of African American Financial Professionals (CAAFP) is a community dedicated to education, mentorship, and networking. The nation’s largest annual event for Black financial professionals held its 14 1/2 annual conference virtually in 2020 with over **1,300 registrants** from over **300 companies and independents**.



AFRICAN AMERICAN SCHOLARSHIP PROGRAMS

The African American Advisors Scholarship supports early-career professionals, and the HBCU Scholars Program is a resource to inspire future generations of Black advisors through a partnership with Historically Black Colleges and Universities.

AFRICAN AMERICAN ADVISORS COMMUNITY

Networking, mentorship, and kinship is more sustainable through the power of technology that connects Black financial professionals across America. From CAAFP to this new online community, we are establishing a long-term engagement network that will promote career success and lifelong learning.



Democratizing Philanthropic Education

The College’s mission is partially rooted in giving back through a philanthropic lens. Education can help professionals utilize their talents and treasures on behalf of all communities, including underserved cultural communities.

CAP® IMPACT SCHOLARSHIP PROGRAM

Nonprofits are driving the growth of The College’s Chartered Advisor in Philanthropy® (CAP®) program. This program supports nonprofit gift planners from historically underrepresented communities in their pursuit of advanced knowledge by offering partial scholarships for the CAP® program.

break down barriers to entry through scholarship and research, delivering the applied knowledge that philanthropic professionals need to cultivate a wider network that includes donors of color.

ADVISORS OF COLOR COMMUNITY

Through a transformational gift, and the establishment of the Blunt-Nickel Professorship in Philanthropy, The College works to

Built on the foundation of the CAP® program, and leveraging passionate, purposeful CAP® alumni, the community seeks to expand the knowledge network and amplify the need for legacy planning across America.

THE AMERICAN COLLEGE OF FINANCIAL SERVICES IS GUIDED BY THE LEADERSHIP OF OVER 100 VOLUNTEERS WHO SERVE ON ADVISORY BOARDS SUPPORTING THE COLLEGE'S CENTERS OF EXCELLENCE, ALUMNI ASSOCIATION, AND THE OFFICE OF THE PRESIDENT.

PENN MUTUAL CENTER
FOR VETERANS AFFAIRS:

Veterans.TheAmericanCollege.edu

CARY M. MAGUIRE CENTER FOR ETHICS
IN FINANCIAL SERVICES:

Ethics.TheAmericanCollege.edu

NEW YORK LIFE CENTER
FOR RETIREMENT INCOME:

Retirement.TheAmericanCollege.edu

STATE FARM® CENTER FOR
WOMEN IN FINANCIAL SERVICES:

WomensCenter.TheAmericanCollege.edu

MASSMUTUAL CENTER
FOR SPECIAL NEEDS:

SpecialNeeds.TheAmericanCollege.edu

NORTHWESTERN MUTUAL GRANUM
CENTER FOR FINANCIAL SECURITY:

Granum.TheAmericanCollege.edu

ALUMNI ASSOCIATION:

Alumni.TheAmericanCollege.edu

OFFICE OF THE PRESIDENT:

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