



AFCPE

WHERE
PURPOSE
MEETS
PASSION

2024

Year in Review

WHERE
PURPOSE
MEETS
PASSION

2024 YEAR IN REVIEW

CONTENTS



6

Meeting
the Moment

11

Programs
that Matter

20

Professional
Development

24

Experience
AFCPE
Symposium

28

Our Impact

34

Team & Partners

FROM THE EXECUTIVE DIRECTOR

DEAR FRIENDS,

In 2024, we embarked on year one of our 3-year strategic plan of Meeting the Moment—to certify, to educate, to connect, to impact, and most importantly to build for the future. We are at a pivotal moment for our organization, for the future of our field, for our professional community, and for the individuals and families that we serve.

This report shares some of the key work that has been done in 2024—by the AFCPE® staff, the board, and our community. It serves as an important lens into our hope for the future, and a call to action to our members, our certified professionals, and our partners.

You are the heart of this work:

- You are conducting research that informs practice and policy.
- You are educating our students.
- You are providing one-on-one and group financial counseling and coaching to individuals and families from all incomes and backgrounds.
- You are using your voice to elevate awareness for high standards and a more integrated personal finance field.

Together, we work to achieve our vision:

- To ensure that all people have access to high quality financial counseling, coaching, and education.
- To ensure that AFCPE® professionals are accessible in every community and to every person—regardless of income or background.

When we do this, we ensure that all people have the opportunity to achieve lasting financial well-being.

Thank you for being a part of this journey with us— for getting certified, for investing in your continued education, for engaging with our community, and for contributing your time, talents, or treasure to programs and initiatives that are making real impact in the lives of individuals and families nationwide.

As we look ahead, the future is bright—and it's because of you.



**SETTING THE
STANDARD,**

Rachael DeLeon
Executive Director
AFCPE

1

MEETING THE MOMENT



OUR MISSION

AFCPE® aims to positively impact the financial well-being of ALL people by ensuring the highest standards for financial counseling, coaching, and education.

OUR VISION

Together, we are working toward a future where everyone has access to high-quality financial counseling, coaching, and education with the opportunity to achieve lasting financial well-being.



WE CERTIFY

Setting and protecting high standards—for the field of personal finance.

WE EDUCATE

Meeting the professional development needs of our diverse and engaged community.

The 5 Core Focus Areas of Our 2024–2026 Strategic Plan

WE CONNECT

Building partnerships that build capacity, expand equity, and ensure access.

WE BUILD FOR THE FUTURE

Securing our foundation
to scale and sustain.

WE IMPACT

Lifting awareness and advocating for
the value of the AFC® to ensure all
people have access to high-quality
financial counseling, coaching,
and education.

Our Guiding Principles



Equity and Inclusion

Diversity is necessary to ensure full access and understanding of each community's needs. We must represent the communities we serve on all levels.

Highest Standards

Quality remains a non-negotiable, and we will keep raising the bar. We hold ourselves to high standards, not only to ensure that financial counselors are fully qualified but also to demonstrate what we expect of an AFC®.

Integrity

AFC certification defines clear guidelines for conduct. We uphold the same standards so our community can count on us.

Accessibility

Our programs must reach people where they are in order to be impactful. We avoid a one-size-fits-all approach by actively and effectively tailoring programs to our different audiences. We strive to accommodate all accessibility requests.

Sustainability and Scalability

Ensuring everyone can achieve financial well-being requires breadth and depth, sustained over time. Our impact takes a long-term commitment, so we must build and expand aggressively and thoughtfully.



2

PROGRAMS THAT MATTER

Certification, education, and training that
meets needs and raises standards



AFC[®] Certification

Setting and protecting high standards—for the field of personal finance.



WHY THE AFC?

Confidence

The Accredited Financial Counselor (AFC) certification provides you with the knowledge and experience to meet individuals and families where they are, help them build a strong financial foundation, realize their goals and achieve lasting financial well-being.

Credibility

The AFC is nationally accredited by the NCCA. This means the mark meets standards that show that the educational content and testing for the AFC is psychometrically sound and has been developed, maintained, and governed at the highest standard. NCCA accreditation sets the AFC certification mark apart from all other financial counseling certifications in the field. It confirms to employers, colleagues, and clients the rigor and quality of the AFC education.

Impact

Accredited Financial Counselor (AFC) professionals are on a mission—to ensure that all people have the information and

confidence needed to achieve lasting financial well-being. AFCs are not salespeople; they are financial counselors, coaches, and educators who provide strategies to help individuals and families manage their money. They guide individuals and families through earning, spending, saving, and debt management with the end goal of obtaining lifelong financial well-being.

All AFC professionals must meet the 4 E's



2024 AFC® Program Highlights

Developed an AFC practice exam

Launching in January 2025, the AFC practice exam was designed to help candidates better prepare for the comprehensive AFC exam. It's made up of 150 questions, allowing you to simulate the exam experience, and gain feedback on areas where you may need additional study.

Approved four new Registered Education Providers (REP)

We have more than 35 university undergrad and graduate programs that offer a pathway to the AFC certification. We have 2 non-degree seeking programs. And we have an innovative partner in Dalton Education by Cerifi helping to integrate the AFC and CFP® education to ensure more well-rounded, dual certified professionals and a more integrated approach to financial services.

AFC ENROLLMENTS

+25% YoY

(Jan-Oct 2023 vs 2024)

NEW REPS IN 2024

Bellevue University

California University Long Beach

The University of Akron

Dalton Education by Cerifi

Developed new partnerships for AFC experiential hours

Providing viable options to help AFC candidates earn experience hours and gain more exposure to the field. New partners include:



If you or your organization have experiential opportunities, reach out to certification@afcpe.org.

#ValueofanAFC: Voices of 2024 AFC® Grads



“This milestone isn’t just about adding another credential to my name. It’s about marking nearly two decades of dedication to financial coaching. This achievement not only reflects my unwavering commitment to excellence but also underscores the significance of perpetual learning. It’s a reminder that with passion, perseverance, and a heart dedicated to genuinely helping others, there are no limits to what we can achieve.

I’m more fired up than ever to empower, enlighten, and elevate everyone I work with. It’s time to continue the work that truly transforms lives and take it to the next level with training and financial wellness program development. Here’s to the next chapter, to greater heights, and to the profound difference financial health can make.”

Ericka Young
AFC®



“What do you get when you mix a degree in behavioral science with financial nerdery and a pathological need to be helpful? You get an Accredited Financial Counselor® from AFCPE® (Association for Financial Counseling and Planning Education®)!

Managing your money is about more than the math—it’s also about your mindset, emotions, and attitudes. Send me your soul-crushing debt problems and let’s get to work!”

Dana Kimmelman
AFC®



Money Management Essentials

Building Capacity to ensure all people have access to well-trained, trusted financial counselors, coaches, and educators.



In 2024, we saw banks and credit unions, higher education providers, and nonprofit organizations start on the path to capacity building.

OUR CAPACITY BUILDING MODEL:

1

Start with Money Management Essentials. Providing a firm foundation for your team.

2

Identify select staff members to go on to earn the AFC® certification. This ensures staff readiness for the more rigorous AFC program, and ensures you have content matter experts on your team.

3

Adopt AFCPE® membership as your professional development strategy. Membership provides your staff members with year-round access to high quality continuing education and a strong community of support.

WHAT NONPROFIT PARTNERS ARE SAYING

“Partnering with AFCPE® to support our nonprofit partners in accessing both foundational skill development through the Money Management Essentials course and professionalization opportunities through the AFC® has taken United Way of Massachusetts Bay’s capacity building to the next level!

Pairing the AFCPE trusted curriculum with an instructor-led cohort learning program allows participants to connect across organizations, have a shared foundation of knowledge, and apply the material to their work immediately. AFCPE’s scholarships ensure we can continue to equip our network with high quality, standards-based learning and development to show them their work matters. Individuals and families with low-moderate incomes deserve access to financial education and individualized support of the highest standard and that is exactly what this partnership is achieving.”



Christine Niccoli

Director of Economic Inclusion
& Wealth Building

United Way
of Massachusetts Bay



“The AFCPE Money Management Essentials [course] has been a valuable addition to our onboarding processes. When we transitioned our services to primarily remote following the pandemic, and as we expanded our coaching team, we needed to adapt our onboarding process to be more efficient, self-directed, and comprehensive. The AFCPE course offered a great solution, with engaging and relevant educational modules that cover a wide range of topics. It also helped us standardize content and offered a way to track and monitor learning progress. This [course] has helped ensure our financial coaching team has a strong financial education so that they can provide high-quality and client-centered services to the families in our programs.”



Jason Andrade

Director of Financial Services
Compass Working Capital



NEW IN 2024

Money Management Essentials is now approved for CEUs and experience hours!

8.5 CEUs for CERTIFIED FINANCIAL PLANNERS® (CFP®)

Ideal for planners interested in rounding out their education and for those who provide pro bono financial counseling and planning services.

10 CEUs for AFC® certified professionals

A valuable refresh of foundational skills.

10 experience hours for AFC® Candidates

Great experiential activities to help reinforce learning as you prepare for your AFC exam. Candidates who enroll in Money Management Essentials may apply the cost of the course to the AFC exam.

AFCPE® Essentials Courses

Online courses that build on your foundational knowledge helping you deepen the impact you make in the lives of the unique individuals and families you serve:



FINANCIAL INCLUSION ESSENTIALS

1 in 4 Americans are living with a disability. Learn how to navigate the unique resources available so you can help build the financial well-being of people with disabilities.

DEI ESSENTIALS

Understand the history of financial access, learn to identify implicit bias, and gain effective communication skills and tools to make your practice and your work with clients more inclusive.

MILITARY ESSENTIALS

Acquire knowledge and tools to better support the unique financial challenges and opportunities of military service members, veterans, and their families.

COLLEGE FINANCE ESSENTIALS

Help your clients navigate the college finance landscape—from choosing the right school, understanding the tax benefits of higher education, applying for and paying back student loans, and preparing for a career.

All AFCPE Essentials courses are approved for AFC® and CFP® CEUs, as well as AFC candidate experiential hours.



"Shout-out to the creators of the DEI course, it was thorough and well designed. I learned and updated the knowledge previously acquired to what DEI has grown and evolved into as we navigate the changes in our community and country."

2024 Program Highlight

With generous funding from the FINRA Investor Education Foundation, the AFCPE® Education team is working with subject matter experts to redesign Military Essentials. The new course will launch in early 2025.



PROFESSIONAL DEVELOPMENT

Continuing Education + Community
Connection = Impact



"I would not be the financial counselor I am without the education and the network that being a member of such an amazing organization provides."

Markia Brown
AFC®

AFCPE® Membership

You don't have to be AFC® certified to be an AFCPE Member. Membership brings together financial professionals from across the personal finance continuum to learn, connect, and grow—in your career and in our vision for a more integrated field that is accessible to all.

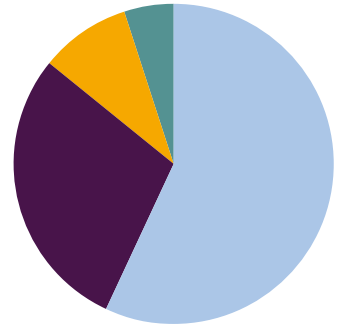
If you're passionate about helping people with their money to improve their lives—you're in the right place.

More organizations are taking advantage of the savings, value, and convenience that AFCPE Membership offers.

Special Membership Rates for Groups

- Ensures that your team has year-round access to continuous learning through high quality, convenient professional development webinars.
- Expands your internal capacity by connecting staff with a community that can answer questions, exchange ideas, and offer resources to support your work.
- Provides discounts toward AFC certification, Essentials, and the annual AFCPE Symposium.

WHO MADE UP AFCPE MEMBERSHIP IN 2024?



59% AFC Professionals

27% AFC Candidates

9% Allied Professionals

5% Students

2100 Members and growing

50 States

AFCPE members work across financial education, research, and practice including:

Banks & Credit Unions

Private Practice

Academia

Military/Government

Nonprofit Organizations



Professional Development Webinars: Something for everyone.

AFCPE® webinars are free for AFCPE Members. How do we select our topics? By listening to our members! We deliver content that supports you in your work and your career.

2024 Highlights

Some of the great content offered this year
(now available on demand).



Moving Do's and Don'ts

Cybersecurity

The Current State of Federal
Student Loan Repayment

Finance in Full Color – Effectively
serving diverse communities

Let's Collaborate – Building a
financial coaching practice

Keys to Effective Teaching

15 Important Financial
Transitions for Later Life

Military Series:

- Transition Superstar
 - Avoiding Common Tax Errors
 - Let's Talk Credit
-

Emotional Currency:
Navigating emotion's influence
on financial decision making

Education Planning:
Student loans and beyond

Advocate for New Immigrants:
Allyship and coaching for
accelerated financial confidence

Enhancing Client Discussions

The Triple-decker Club
Sandwich Generation

The Basics of Equity Options: A
beginner's guide

Salary Secrets: Negotiate your
way to worth

Overcoming Scams: Tools,
resources, and tips to know

Unlocking the Secrets to
Maximizing Your Purchasing
Power: Understanding
lender's FICO

Money Topics and Talks to
Start, Strengthen, or Rebuild
Marriages

Addressing ID Theft on
Credit Cards

Ensuring Equity:
Understanding and upholding
the Fair Housing Act

The Current State of Federal
Student Loan Repayment

Helping Clients Budget in
Real Life

The Impact of Culture on Money
Attitudes:
Understanding honor, face,
dignity, and their relation to
money scripts

Virtual Meet-Ups

Virtual meet-ups offer AFCPE® members a platform to expand knowledge, develop critical skills, and build meaningful connections within the community. Sessions are thoughtfully designed to tackle relevant topics, from complex client scenarios to professional development, making membership invaluable for those looking to stay current, sharpen skills, and leverage a supportive network.

2024 Highlights:

Some of the amazing conversations and networking that took place this year (most available on demand).

Untangling Boundaries:
Emotional Fusion and Financial
Trust in Blended Families

Networking Chat:
Financial Trends

The Philosophical Paradigms
and Behavioral Profiles
in Financial Counseling:
Understanding Advisor Impact

5 Sectors of Professional
Connections

Get Found, Get Booked:
How to Write SEI Website
Copy That Results in More
Discover Calls

Connect & Create:
Peer Content Review

Couples & Money:
When She is the Breadwinner

Coaching Dynamics:
Interactive Scenario Roleplay

Gig Economy Conversations

The Art of Listening

Part 2: Get Found, Get Booked:
The Financial Coach's Brass
Tacks Approach to Profitable
Content Marketing

Networking Topic Chat:
Client Engagement

Helping Clients Identify and
Overcome Scams

Networking Chat:
Collaborations and Partnerships
for Personal Finance
Professionals





EXPERIENCE AFCPE® SYMPOSIUM



2024 Highlights:

CONTINUAL FOCUS ON ACCESSIBILITY AND EQUITY:

In addition to our onsite event, we now offer a virtual track to ensure the Symposium experience is accessible to those who are unable to travel due to budget, time, or physical constraint.

New! Virtual attendees now have access to all breakout session recordings—giving attendees more than 85 hours of professional development content.

Scholarships available through the generosity of Symposium Sponsors and donations to the AFCPE Strategic Impact Fund.

Closed captioning available on live stream and session recordings, and ASL interpreters are available for general sessions.

New! A Pre-Symposium community outreach event brings together local nonprofit service professionals who are focused on improving the financial health of underserved individuals and families in Central Ohio.

The event helps expand capacity and build connection within our host city.

Ideas Exchanged

Participants had conversations on overcoming common challenges and seizing new opportunities to better serve their community.

Connections Built

They connected with fellow nonprofit professionals to share experiences and build valuable relationships.

Skills Developed

They enhanced their knowledge with hands-on activities and training in personal financial counseling and coaching.

Resources Gained

They learned about various grant funding streams and opportunities to support their work.

Many participants were able to stay for the full Symposium, allowing them to continue to learn, network, and grow with other professionals from around the country.

SPONSORED BY

**JPMORGAN
CHASE & CO.**



Member-Driven Impact

The individuals who serve on AFCPE® Member Task Forces are the heartbeat of our organization. They serve as an extension of our staff to help us carry out the initiatives of our strategic plan.

Thank you to all of our members who volunteered their time and their talents in 2024.



2024 TASK FORCE HIGHLIGHTS

New Programs & Resources

Communications (pilot) Task Force

Developed resources to help AFC® professionals share the #ValueofanAFC. The resources are customizable—and can be shared with potential clients as well as allied professionals for building a stronger referral network.

Government Relations Task Force

Designed an Advocacy Toolkit to provide members with valuable resources to help them identify issues that are impacting consumers and provide guidance on effective approaches to advocacy.

Research to Practice Task Force

Developed a comprehensive Research to Practice grant program that was approved by the Board of Directors as a Strategic Impact Fund project. Program will launch in early 2025!

Continual advancement of our offerings:

Awards

From nominations to review to selection to celebration, this task force helped celebrate the good work and innovation happening in our field.

DEI Task Force

Hosted a webinar on “Upholding the Fair Housing Act” and offered virtual and in-person conversations with the community on how to be an ally to those with acquired disabilities.

Investment Task Force

Supported the Board Finance Committee by providing a quarterly review of investment statements and supporting the revision of investment policies.

Member Engagement Task Force

Created vibrant discussions and fostered connections in our Empowerment Communities for Military, People of Color, and Private Practice.

Newsletter Task Force

Created, planned, and edited quarterly content for the AFCPE newsletter, The Standard.

Student Task Force

Devised a recommended list of sessions and sponsored a special meet-up room at the AFCPE Symposium.

Symposium Task Force

Edited the proceedings, reviewed and selected breakout sessions, and assisted with program creation for our largest event of the year.

2024 AFCPE® Awards

Honoring the good work and innovation happening in the field of personal finance.



Outstanding Research Journal Article Award
 “Could Coaching Improve Consumer Credit Use Behavior? Evidence from a State Program” JFCP, Vol 34, Issue 3: Brett Theodos, Daniel Teles, and Benny Docter



AFCPE® Outstanding Educational Program Award
 3rd Decade Financial Education Program



Mary Ellen Edmondson
Educator of the Year Award
 Virginia Zuiker, AFC®



Outstanding Financial Counseling and/or Planning Center Award
 Financial Success Center:
 Virginia Credit Union



AFCPE Financial Counselor of the Year Award
 Sue Rogan, AFC®



Setting the Standard Award
 Compass Working Capital



Outstanding Consumer Information Award
 “Overcoming Financial Trauma”
 by Rahkim Sabree, AFC®

Mary O'Neill Mini Grant
 The Asset Management Properties (AMP) Financial Empowerment Project by Pilar Pangelinan, AFC®

5

OUR IMPACT





Veterans Benefits Banking Program: Veterans Financial Counseling Initiative

More than 1,500 clients have connected to an AFC® from 50 states and territories since the program's launch.

46

Average Age

47%

From the Army

68%

Have a Disability or are in the Process of Applying for Disability

8%

At Risk for, or Experiencing Homelessness

64%

Male

28%

Black

47%

White

13.5%

Hispanic

2024 HIGHLIGHTS

Integrated our financial counseling platform with VetCents to create a more streamlined experience for both Veterans and the financial counselors who are serving them.

Created promotional resources for VBBP counselors to amplify the pro bono opportunity with their networks.

Expanded counseling engagements, now allowing Veterans to meet with an AFC for up to three (3) sessions.

Impact Beyond the Numbers

"[My counselor]'s overview and evaluation were invaluable. The time he spent helping me produce a realistic budget helped fine tune my current and future financial situation and point to potential solutions. I can say without hesitation the generosity with his time, knowledge, and the ability to pinpoint specifics exceeded any similar interchange I've ever experienced. As much as anything, I came away with peace of mind."

"[My counselor] was extremely helpful! Not only did she teach me a lot about how to improve my credit score, but also different ways to keep building for retirement."

Partnerships that build capacity, expand equity, and ensure access.



Coordinated Assistance Network

FINRA Foundation Military Spouse Fellowship

Since the advent of the Fellowship in 2006, FINRA Foundation Fellows have served more than 274,000 service members and their families, impacting communities across the United States and around the world.



This year, 30 military spouses embarked on a journey to earn their Accredited Financial Counselor® (AFC®) designation, paving the way for impactful careers in financial empowerment.

Over the years, the FINRA Foundation Military Spouse Fellowship has not only equipped 709 military spouses with the AFC certification but also fostered a community of financially empowered families across the globe.

One such success story is from Darya Morrison (Class of 2020), showcasing the tangible impact of the program on military communities.

"As a military spouse, my work is dedicated to improving the financial readiness of both service members and civilians. In my role, I have witnessed firsthand the profound impact that sound financial advice can have on individuals and families. I am invested in the financial well-being of the communities I work with."

Darya Morrison
Class of 2020

AFCPE Strategic Impact Fund

Help us continue to support strategic initiatives that positively impact you, your clients, and your communities.

CURRENT FUNDING **\$1.3M**

GOAL **\$2M**

The AFCPE Board of Directors voted to become a 100% Giving Board in 2025.

The commitment to making an annual financial contribution to AFCPE reflects the Board's belief in, and support of, the mission and goals of the organization.

2024 STRATEGIC IMPACT INITIATIVES

Capacity Building Scholarships

40 Money Management Essentials courses provided to 3 nonprofit community-based organizations. Recipients were invited to apply for AFC scholarships in the fall.

Individual AFC® Scholarships

30 AFC certification scholarships awarded, helping candidates offset the costs associated with earning the AFC credential and empowering them with the knowledge and experience to be #AFCchangemakers.

Symposium Scholarships

30 Symposium registration scholarships awarded to students and professionals.

"Through the Money Management Essentials course, our team [is receiving] advanced training in critical financial topics, including debt reduction, health insurance navigation, and investment basics. This opportunity allows us to better serve our community and help individuals and families achieve financial empowerment."



Contact AFCPE Executive Director, Rachael DeLeon, to discuss how you or your organization can maximize your impact and partner in fulfilling our mission and vision.

rdeleon@afcpe.org



Scan code
to give

www.afcpe.org/give

Investments in Infrastructure Help Us Build for the Future

STRATEGIC OPERATIONAL UPDATES IN 2024

Conducted an accessibility audit of our technology and began to outline a roadmap for the future.

Invested in headcount to support operational growth.

Invested in updates to data security and implemented regular security training for staff members.



STRATEGIC FOUNDATIONAL WORK LED BY OUR BOARD OF DIRECTORS

Finance Committee

In conjunction with our Investment Task Force, this committee updated our investment policies to provide clarity and parameters that support careful and strategic growth and protect the long-term health of the organization.

Nominations Committee

Interviewed board candidates with a lens for the needs of the organization. Members voted, and three new board members were selected. Welcome, Cain Hill, Anna Scheufelt, and Axton Betz-Hamilton.

Governance Committee

Created a comprehensive board operations manual and worked in conjunction with legal counsel and consultants to update the AFCPE bylaws. Changes will be voted on by the membership in 2025.

Ad Hoc Development Committee

Approved a 100% Board Giving Policy, which will go into effect in 2025. Developed a grant submission form to better support the staff's development efforts and brought in outside training for the larger board on fundraising and business development.

\$5,329 Raised for the AFCPE Strategic Impact Fund*

Thank you, 2024 Donors

The donors listed below made a contribution to either the AFCPE Strategic Impact Fund, AFCPE Operations (noted by an **), or a combination of the two (***). Your generosity goes a long way in helping AFCPE carry out our mission and our vision.

Friend (up to \$25)

Angelina Adame-Gignac
Leisa Aiken
Alexander Ali
Vivian Anaya
Brandy Baxter
Khalila-Taji Brokos
Scott Bramlett
Javier Carrasco**
Lisa Champagne Minyard
Soo Hyun Cho
Patricia Cochran
Jacqueline Cooper
Merri Davenport**
Jennifer Funk**
Michele Godfrey
Sara Griffin
Miguel Hernandez**
Danae Hoekstra
Ann House
Petronella Hunt
TK Jones*
Tim Johnson**
Nicholas King**
Andrea Klein
Rachel Konchinsky-Pate

Julie Kopjoe
Dwayne (D.C) Lanier**
Leland Lanway**
Simi Mandelbaum
Alfredo Martinez**
Chantelle McLennon
Melissa Mittelstaedt**
Angel Morales Melendez
Jae Morgans**
Romualdo Mortel
Rosemarie Mourad
Barbara O'Neill
Kendra Priddy
Thanigai Ranganathan
Jennifer Richards**
James Robinson
Nicole Standish
Glenn Sturm
Adrienne Taylor
Luttasha Taylor
Maria Tupas
Dana Twilight
Patricia Vanluven
Tanisha Williams
Bernice Wilson
Ryan Wisner**

Rodolfo Wolter**
Anonymous (9 Donors)

Supporter (\$26-\$50)
Angela Ambrose**
Shirley Anderson-Porisch
Jacqualine Arnold
Tenishelah Boatright***
Dawn Bradley-Fletcher
Paul Camp
George Katsinis
Yolanda Lawler
Stacy Livingstone-Hoyte
Brian Lomax
Silke Murray
Michael (Mike) Richardson**
Tracey Sammons
Martina Simpson
Oscar Torres-Diaz**
Andi Wrenn
Anonymous (4 Donors)

Champion (\$51-\$100)
Gregory Anderson
Rachel Appellof
Jacquie Carroll

Samuel Coston
Gregory Hagenbuch**
Jeffery Isom**
Gian Motta
Bud Schneeweis
Anonymous (4 Donors)

Advocate (\$101-\$499)
Don Fulton
Sean McPhilamy
Cherie Stueve

Ally (\$500+)
Cain Hill
Ann Lentell

*Donations as of 10/1/2024

Thank you to everyone who purchased merchandise from our AFCPE Spirit Store. All proceeds went directly to the AFCPE Strategic Impact Fund. Between Spring and Fall, we raised \$550 for the fund.



TEAM & PARTNERS



Meet Our Team

Executive Team

Rachael DeLeon
Executive Director

Ashley Maurer
Operations Officer

Sherry Wallace
Finance Manager

Amanda Paolicelli
Executive Coordinator

Certification

Michelle Starkey
Certification Director

Jarod Taylor
Certification Manager

Kay Robinson
Certification Coordinator

Noel Morrell
Certification Coordinator

Education

LaTonya Parsons
Education Director

Summer Red
Education Manager

Valerie Richards
Education Manager

Heather Baker
Education Coordinator

Ann Hamilton
Special Programs
Coordinator

Member Services

Zulairam Ruiz-Agosto
Member Services Manager

Jing Jian Xiao, Ph.D.
Journal Editor

Communications

Tara Meehan
Marketing &
Communications Director

Sara Martin-Fuller
Special Events Manager



2024 AFCPE Board of Directors



Don Fulton
President
Service



Andi Wrenn
Past President
Service



Brandy Baxter
President Elect
Practitioner



Michael Roush
Treasurer
Accessibility



Sasha Grabenstetter
Secretary
Financial Industry



Jacquie Carroll
Service



Lucy Delgadillo
Academia



Andia Dinesen
Financial Industry



Rita Green
Academia



Ann Lentell
Service



Barbara Martinez
Accessibility



Jessica Limbrick
Practitioner



Lynne Patterson
Military

CERTIFICATION COUNCIL

Bret Anderson
Chair
Rebecca Selkove
Darryl Jones

Sara Croymans
Blain Pearson
Sydney Hanson
Jeanie Adkins

Thank you to our partners for an incredible year.

FUNDERS

JPMORGAN
CHASE & CO.

FINRA
Investor Education
FOUNDATION

Magellan
FEDERAL

NEFE
National Endowment
for Financial Education

MARK & WINNIE TIBBS
FOUNDATION

**WELLS
FARGO**

 Higher Education
Financial Wellness
ALLIANCE

Zeiders Enterprises
A quality of life company



groove

PROGRAM PARTNERS

 ADVANTAGE
PUBLICATIONS

 Coordinated
Assistance
Network

 Credit Builders
ALLIANCE



 College Aid Pro™

 DataPoints™

ndi

 Financial Behavior
KEYNOTE GROUP

Financial Coaches
NETWORK

LACEY'S BUSINESS
Builder

FINANCIAL
PROFESSIONAL
ROUNDTABLE
DISCUSSIONS

 FTA

 fisecal

 Higher Education
Financial Wellness
ALLIANCE

 quickbooks

SAGE
Financial Solutions

visi**W**health

 wealthtender



79 S. State Street, Suite D3
Westerville, OH 43081

afcpe.org