



**Theodore R. Daniels**

Theodore “Ted” Daniels is a global financial educator, author, and adjunct professor. Daniels is the founder/president of the Society for Financial Education and Professional Development, Inc. (SFE&PD), a nonprofit teaching financial literacy to people of all ages and backgrounds, with an emphasis on underrepresented groups and HBCU students. For the past 21 years, SFE&PD has taught financial education to over 425, 000 including 325,000 students at 90 colleges and universities, and won awards for its efforts. The Society for Financial Education and Professional Development, Inc. was recognized in The United States Financial Literacy and Education Commission’s 2019 report as having best practices for providing financial education at institutions of higher education. A national leader in the financial literacy movement, Daniels teaches financial education workshops to diverse audiences, including college students, seminarians, pastors, and nonprofit advocates, to help people become financially empowered. He has over 35 years of experience serving as a financial advisor and registered investment advisor.

Globally, Daniels was chosen by the U. S. Department of Education to deliver a keynote address about U.S. financial literacy initiatives at the Asia-Pacific Economic Cooperation’s (APEC) Conference in Beijing, playing a key role in APEC’s first financial and economic literacy guidebook. He co-authored *Financial Literacy Education: Addressing Students, Business, and Government Needs*, a book on financial literacy efforts in the United States and abroad.

The FDIC awarded Daniels and SFE&PD the Chairman’s Award for Excellence and Innovation in Financial Education for Daniels’ efforts to provide financial literacy training to HBCU students. President George W. Bush appointed Daniels to the President’s Advisory Council on Financial Literacy in 2008, and he served until 2010. Daniels has also served the Board of Directors of the Certified Financial Planners Board of Standards. He was appointed to the Securities and Exchange Commission’s Investor Advisory Committee in May 2020.

In 2017, Daniels, who is often called upon for financial education curriculum development advice, launched an innovative peer-to-peer financial literacy program to teach college students about personal finance. The SFE&PD Student Ambassador program, which targets students at Historically Black Colleges and Universities (HBCUs), has quickly expanded. SFE&PD currently collaborates with 15 schools: Alabama A&M University, Bowie State University, Howard University, Miles College, Florida Memorial University, Bennett College, Jackson State University, North Carolina A&T State University, South Carolina State University, Grambling State University, North Carolina Central University, Medgar Evers College, Miles College, Southern University-Baton Rouge, Southern University-New Orleans. In the Spring of 2021, the program will be expanded to four additional HBCUs.

SFE&PD trains the Student Ambassadors in personal financial concepts so they can lead and teach engaging financial classes to fellow students. Along with business school professors on campus, SFE&PD mentors the Ambassadors and helps them create lessons plans for financial workshops. Student Ambassadors coordinate educational events, teach financial literacy classes, and develop

programs to reach their peers. Financial workshops include topics that interest college students: credit and debt management, investing, student loan management, budgeting, saving, and financial goal setting.

In 2014, Daniels received the Jump\$tart Coalition for Financial Literacy's Visionary Award. Daniels is a board member of the National Center for Children and Families. He is on the Advisory Board for the College of Business at South Carolina State University, a member of Fort Valley State University Foundation's Board, and on Experian's Consumer Advisory Council. Daniels has also served on the Board of Directors of the Certified Financial Planners Board of Standards. Daniels directs SFE&PD's Annual Financial Literacy Leadership Conference, where educators, policymakers and researchers convene to share financial literacy best practices. Daniels has served as a lecturer at Howard University's School of Divinity and taught economics at American University. Daniels has a B.S. from Fort Valley State University and a Bachelor of Laws degree from John Marshall Law School. He is a member of the Kappa Alpha Psi fraternity.