



# The Pledging Tree Foundation

The Pledging Tree Foundation Receives \$2,400 Donation from The Financial Planning Association

### President of Financial Planning Association Presents Check at Board Meeting

Downingtown, PA, July 31, 2008 - The Pledging Tree Foundation (TPTF), based in Chester County, is pleased to announce that it has received a \$2,400 donation from The Philadelphia Tri-State Area Chapter of the Financial Planning Association (FPA). President, Scott Michalek, presented the check at TPTF's July Board Meeting. Dave Hoyer, Vice President of Pro Bono stated, "Our Pro Bono Team volunteers look forward to working with this wonderful grass roots organization to mentor financially stressed families as they learn strategies to achieve a financially secure future."

### TPTF Enrolls Four Families Into the Program

Downingtown, PA -- At TPTF we make a difference one family at a time. The enrolled families are very motivated individuals who are trying to restart their lives but need assistance when it comes to being financially sound. The profiles of families consist of mostly single mothers with children. We believe that we have started small and are willing to grow little by little, eventually hoping to enroll many more families into the program. The enrolled families are working with certified financial planners one-on-one to manage their financial future. These families are mandated to attend three out of four financial workshops conducted during the enrolled period. More new applications are being reviewed by the selection committee.

The Pledging Tree Foundation participates at the Chester County Homeownership Fair

Coatesville, PA, October 18th 2008- The Pledging Tree participated in the Chester County Homeownership Fair that was conducted at the Olivet United Methodist Church in Coatesville, PA. It was a good opportunity for TPTF to create program awareness throughout the community. The participating families took a lot of interest into TPTF, by registering for the workshops held at the Government Services Center and The West Chester Public Library.

### Measuring Our 2008 Success

At the beginning of 2008, we created a realistic goal in terms of how many families we would enroll and how many workshop we will conduct in the year. As seen below, we are on target or have achieved our goal for 2008.

| Criteria                   | Goal | Actual |
|----------------------------|------|--------|
| No. of Families Enrolled   | 5    | 4      |
| No. of Financial Workshops | 4    | 4      |

### Past Events

Financial Workshop I: Financial Planning Before and During Life's Transition Points

**Date/Time:** October 28, 7:00 - 8:30 pm  
**Venue:** Government Services Center, 601 Westtown Road, Room 339, West Chester, PA 19380

Financial Workshop II: Sound Financial Planning Tips for Teens

**Date/Time:** November 18, 6:00 - 8:00 pm  
**Venue:** West Chester Public Library, 415 North Church Street, West Chester, PA 19380



**Andy Romberger- Chairman of Family Selection Committee**

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### TPTF— A case study at Penn State, Great Valley

Malvern, September 3, 2008 -The Pledging Tree Foundation has been selected as one of seven non-profits to be studied at the Penn State Great Valley Campus. The study was done by graduate students as part of a Social Entrepreneurship & Community Leadership course. As per course requirements, TPTF representatives made a presentation briefly explaining the needs of the organization. During the semester, a student team performed a detailed analysis and asked questions regarding the organization and/or the team project. At the end of the term, the student team presented their marketing plan and recommendations to the class, as well as to the foundation.

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**TPTF needs your contribution!**

The Pledging Tree could not have accomplished much without your valuable contributions. You have already started making a difference in the lives of our four enrolled families . Our goal is to enroll 5 more families in the year 2009.

At TPTF, we believe that everyone has the potential to contribute to the success of those who are struggling in these hard economic times. By contributing this holiday season, you will bring a meaningful change to the lives of more families. We ask for your support with donations. You can donate funds through The Pledging Tree website [www.thepledgingtree.org](http://www.thepledgingtree.org) or you can mail a check at the foundation’s address **mentioned below.**

**Featured Team Member Andrew Romberger**

Andrew Romberger has been one of the key members in the success of Pledging Tree Foundation. Andy, along with his team at Fox Rothschild, worked pro-bono to move The Pledging Tree Foundation forward in terms of all the legal aspects. Andy also heads the Family Selection Committee in which he leads the review of all applications to determine who is to be enrolled in the program. The entire team at The Pledging Tree would like to thank Andy for his dedication and hard work in making this program a success.

Andy works as an attorney for Fox Rothschild, a group of attorneys who help serve businesses and clients in the community. Andy is a member of the Pennsylvania and Chester County Bar Association.

**How your contribution is making the difference**

The Pledging Tree is helping a working mother of 3 who, unfortunately, lost everything when the house that she was renting burned down last winter. She did not have renters insurance, so it has been rough for her family. The Pledging Tree is making a worthwhile effort so that this working mother can be brought back onto to her feet, and secure a financially sound future for her children. She hopes to develop good saving habits so that she get her life back on track.

**TPTF— A case study at Penn State, Great Valley cont’d**

The following groups members created a marketing plan that outlined the future needs of the organization: Roger Baldino, Bruce Forman, Ryan Mahoney, Bryan McCormick, Matt Trego, Shannon Reilly, and Erinn Wischum. The Pledging Tree thanks Dr. Litzky and the entire group for creating a marketing plan for the Foundation. The Pledging Tree is in the process of implementing some of the recommendations.

**Financial Tip of the Month**

**Have a Savings Plan**

You've heard it before: Pay yourself first! If you wait until you've met all your other financial obligations before seeing what's left over for saving, chances are you'll never have a healthy savings account or investments. Resolve to set aside a minimum of 5% to 10% of your salary for savings before you start paying your bills. Better yet, have money automatically deducted from your paycheck and deposited into a separate account.

**Platinum, Gold and Silver Sponsors of 2008**

1. Financial Planning Association of Philadelphia Tri– State Area
2. SKB Associates
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**Collaboration with Other Agencies**

TPTF has collaborated with the Financial Planning Association (FPA) of Philadelphia to provide financial education and counseling to the enrolled families in the program.

FPA also holds financial workshop open to the public.. The FPA supports TPTF not only through their pro-bono work but also through donations. TPTF thanks Dave Hoyer and Scott Michalek for their support.

TPTF also teamed up with Teen Advisory Board at West Chester Public Library to host a joint workshop for teens.

**Contact The Pledging Tree Foundation**

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