

Diversified Asset Planners

Sponsors Students of Centre County

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The Pennsylvania Council on Financial Literacy (PennCFL) provides to all students in grades 3-12 in Pennsylvania a world-class, web-based stock simulation platform and curriculum. Students can learn how to trade all year long by using the whole curriculum, courses, and more, including two ten-week competitions. The competitions are held in the classroom, by county and state-wide.

The platform provides lessons, assignments, and grading for seamless teacher management. The cutting-edge, real-time stock game is derived from Stock-Trak's University Platform, which is used in over 80% of the top business schools in the United States.

Teachers and students get access to our extensive experiential education teaching and learning tool designed by Stock-Trak, the world's leading provider of investment portfolio simulations for colleges and schools. It offers an entire standards-aligned curriculum library and a distance learning-optimized lesson plan database which includes a Google Slides presentation library, teacher training webinars, a student video library, a full personal finance course and a teacher's dashboard for student assignments, progress reports, and grading.

Diversified Asset Planners was founded on June 10th, 1987 by four individuals including two of our current representatives Donald Leitzell and Nicholas Accordino. We have evolved to having ten planners and seven administrative assistants who manage over \$700 million in client assets, while being able to remain an independent firm. Our main focus is on the needs of the clients. We believe private one-on-one meetings are most effective when discussing such confidential and life-changing events such as retirement and financial allocation.

Our number one strength is service. We serve the client first whether the market is good or bad. We closely monitor the market and make conservative but rewarding suggestions

to the best of our ability. DAP's goal is to help clients gain a better understanding of the financial concepts behind insurance, investing, retirement, estate, planning, and wealth preservation. Most importantly, we hope clients see the value of working with skilled professionals to pursue their financial goals, as well as understanding the opportunities and potential rewards that are available when taking a proactive approach to client's personal financial situation. At DAP many investment options are offered to handle your IRA's, 401(K) rollovers, small business retirement plans, life insurance needs, and other savings plans.

Securities offered through JW Cole Financial member FINRA/SIPC. Advisory services offered through JW Cole Advisors. JWCA, JWC, and Diversified Asset Planners, Inc. are independent entities.

Pennsylvania Council on Financial Literacy (PennCFL) is a 501(c)3 organization and approved by Pennsylvania's Department of Community & Economic Development as an Educational Improvement Organization. PennCFL sponsors financial competitions and entrepreneurial programs resulting in over 20,000 students in Pennsylvania. Training and support are provided to hundreds of teachers.

Our mission is to provide Pennsylvania's K-12 students with economics, personal finance, and entrepreneurship skills that elevate their standard of living, quality of life, and professional success. We showcase exceptional talent across the state, from business, education, and government.

Our nonprofit organization is passionate about teaching young people solid financial management skills. Pennsylvania is one of the most rural states in the country because it is largely made up of small towns and rural communities. Many families here struggle to make ends meet. Our goal is to break that pattern by instilling a firm sense of financial competency and responsibility in the next generation.

Our goal is to be the leader in K-12 financial literacy and entrepreneurship education. For additional information, please contact Alan Dakey, President at ADakey@penncfl.org or Carolyn Shirk, Vice President CShirk@penncfl.org, call 570-975-5149 or visit us at www.penncfl.org.