



**THE KAIZEN FOUNDATION
OF NORTH CAROLINA**

P.O. Box 79386
Charlotte, NC 28271

Business: (980) 239 - 1871
TKFNC.org

STRATEGY + OPPORTUNITY + STABILITY = GROWTH

WHO WE ARE

The Kaizen Foundation of NC is a non-profit, tax-exempt organization based in the greater Charlotte area. We are a community-based organization that is committed to advancing financial literacy and upward mobility.

TKF supports the financial education efforts of its partners and affiliates, brings together the financial literacy community to foster cooperation and collaboration. TKF raises the importance of financial literacy and the importance of effective financial education.

OUR MISSION

To improve upward mobility in underserved communities by providing access to resources that empower and create positive influences on a community's collective mindset toward change in pursuit of economic success.

THE STRATEGY

GROWTH

STRATEGY

- PLAN
- STUDY
- ACT

OPPORTUNITY

- IDENTIFY
- PREPARE
- ACCESS

STABILITY

- ORGANIZE
- PREDICT
- CONTROL

FINANCIAL LITERACY & EDUCATION

TKFNC.org



**THE KAIZEN FOUNDATION
OF NORTH CAROLINA**

P.O. Box 79386
Charlotte, NC 28271

Business: (980) 239 - 1871
TKFNC.org

STRATEGY + OPPORTUNITY + STABILITY = GROWTH

ANNUAL FINANCIAL CHECKLIST

Identify/write down financial goals with timelines.

Implement a spending plan.

Set and commit to a budget.

Track the due date of your bills.

Obtain a recent copy of your credit report.

Establish/review retirement accounts.

Get accountable.

TKFNC.org