



25 YEARS OF OPENING DOORS TO

*home* **ownership**  
& **wealth**



*Carrie Davis  
President/CEO  
Wealth Watchers, Inc.*

## *A Message from the President & CEO*

Wealth Watchers is celebrating “25 Years of Opening Doors to Homeownership and Wealth.” We know homeownership is a legacy that leads to generational wealth. There are many benefits to having a place to call your own. From having tax benefits to building equity to creating financial stability, homeownership can give you a sense of belonging in your community. Wealth Watchers continues to find innovative ways to help our clients achieve the dream of homeownership through education, real estate development, community building and engagement, small business services and workforce development.

My team and I are committed to positively impacting our community and those who need our services. We strive to be that support system for individuals, families and small businesses as they achieve their goals. We also strive to build and rebuild communities. We work to strengthen the connection between social capital and economic development.

We appreciate your support as we host our annual Legacy Awards Luncheon during Homeownership Month in June. The goal is to recognize exceptional mortgage and real estate leaders.

This year is extra special as we celebrate our milestone of 25 years serving residents throughout Florida and Georgia. We are honored to share our time, talent and treasures to help make dreams come true. Let’s continue to work together to build wealth for future generations!

## *Wealth Watchers Inc.*

### ■ ABOUT

Wealth Watchers Inc. is a HUD-certified Housing Counseling and Community Development Organization formed as a nonprofit 501(c)(3) in December of 2001. The formation of the nonprofit was a result of a series of meetings of local, financial service professionals who believed that education was the foundation for financial success as well as community and economic stability. Based in Jacksonville with services available throughout Florida and Georgia, its staff is committed to providing a cyclical approach to building wealth among citizens.

### ■ OUR MISSION

The mission of Wealth Watchers Inc. is to build viable communities by expanding the education and knowledge of individuals, families and communities for the purpose of understanding and applying essential financial strategies that lead to the accumulation of generational wealth. Wealth Watchers achieves its mission by providing education, lending, neighborhood stabilization, community revitalization strategies and small business development.

### ■ PROGRAMS & SERVICES

Wealth Watchers Inc. believes that when our neighbors are able to establish and maintain generational wealth, our communities as a whole become safer, healthier and more prosperous. We support this growth by providing programs and services that focus on five strategic areas: Homeownership Promotion, Real Estate Development, Community Building and Engagement, Small Business Services and Workforce Development.



# Events at a Glance

SATURDAY | JUNE 6

On the Green Golf Classic

TUESDAY | JUNE 16

Legacy VIP Reception

WEDNESDAY | JUNE 17

Legacy Awards Luncheon

SATURDAY | JUNE 27

Homebuyers Expo



## June is National Homeownership Month

*25 Years of Opening Doors to Homeownership & Wealth*

National Homeownership Month is a time to celebrate the importance of owning a home and the impact it has on the lives of American families, local communities and the nation's economic health. The focus this year is on expanding access to the American dream, strengthening communities and overcoming housing affordability challenges.

For many, owning a home is usually a person's biggest financial investment. It is about affordability and access. National Homeownership Month showcases homeownership as a source of economic strength and the commitment to ensure that everyone has the opportunity to own a home.

The national spotlight on homeownership began as a weeklong recognition in 1995 as a strategy of President Bill Clinton's administration. It was first proclaimed to last an entire month in June 2002 under President George W. Bush.

# The History & Importance of the Wealth Watchers' Legacy Awards Luncheon

Each year since 2015, Wealth Watchers has proudly hosted the Legacy Awards Luncheon during National Homeownership Month in June.

This signature event serves as a powerful platform to recognize and honor exceptional mortgage and real estate leaders who are deeply committed to turning the dream of homeownership into a reality for individuals and families.

More than just an awards ceremony, the luncheon is a meaningful celebration of collective efforts to expand access to homeownership, especially in historically underserved communities.

It brings together real estate professionals, financial institutions, community organizations and other stakeholders to affirm homeownership's vital role in building generational wealth, stabilizing neighborhoods and strengthening communities.

The Legacy Awards Luncheon features four distinguished awards:

## Chris Britton Sr. Mortgage Loan Officer Award

Named in memory of a dedicated Bank of America loan officer, this award honors mortgage professionals who exemplify a strong commitment to helping families achieve homeownership.

## Real Estate Partnership Award

Recognizing individuals or organizations that have worked closely with Wealth Watchers to promote and expand homeownership opportunities.

## Legacy Award

Celebrating trailblazers in real estate or banking who have demonstrated long-standing leadership in creating pathways to homeownership.

## President's Award

Presented to a financial institution that has significantly contributed to Wealth Watchers' mission of "Building Wealth for Future Generations" by supporting sustainable homeownership.

In addition to receiving the President's Award, an executive-level representative is invited to be the keynote speaker and share his/her institution's vision and commitment to expanding homeownership access. Presidential awardees have also supported the luncheon by serving as Presenting Sponsors, allowing them to further engage their employees and community partners in the mission of promoting housing equity and financial empowerment.

Complementing the luncheon is a special networking event held the evening prior, providing an informal yet impactful space for real estate professionals, bankers, developers and community advocates to build relationships and collaborate around the shared goal of homeownership.



Past keynote speakers have included notable leaders such as Marcia Griffin, CEO of HomeFree USA; Clyde Anderson, SVP of Community Lending with Ameris Bank; and Hugh Rowden, former director of Community and Affordable Lending with Truist.

The Legacy Awards Luncheon is not only a moment of recognition, but also a call to action.

As we face ongoing challenges of housing affordability, access to credit and economic disparity, this annual event underscores the critical importance of expanding homeownership as a cornerstone of community development and wealth-building.



## Sponsorship Opportunities

As a sponsor of the Wealth Watchers Inc. National Homeownership Month, you will be supporting our important mission of helping community members understand the importance of establishing and maintaining legacies of generational wealth as well as promoting your organization.

Sponsor Level	Description	Cost
Presenting <b>Sponsor</b>	<ul style="list-style-type: none"> <li>• Vendor space at Homebuyers Expo</li> <li>• Recognition as a National Homeownership Month Title Sponsor</li> <li>• Corporate logo displayed during the annual VIP Reception and Legacy Awards Luncheon</li> <li>• Branding on all marketing material</li> <li>• Branding on social media campaigns</li> <li>• Ten (10) tickets to Legacy VIP Reception</li> <li>• Two (2) tables at Legacy Awards Luncheon</li> <li>• Two (2) teams (8 players) to On the Green Golf Classic</li> </ul>	<b>\$6,000</b>
Community <b>Champion</b>	<ul style="list-style-type: none"> <li>• Vendor space at Homebuyers Expo</li> <li>• Recognition as a National Homeownership Month Sponsor</li> <li>• Corporate logo displayed during the annual VIP Reception and Legacy Awards Luncheon</li> <li>• Branding on all marketing material</li> <li>• Branding in social media campaigns</li> <li>• Ten (10) tickets to Legacy VIP Reception</li> <li>• One (1) table at Legacy Awards Luncheon</li> <li>• Two (2) teams (8 players) to On the Green Golf Classic</li> </ul>	<b>\$3,500</b>
Community <b>Stakeholder</b>	<ul style="list-style-type: none"> <li>• Recognition as a National Homeownership Month Sponsor</li> <li>• Corporate logo displayed during the annual VIP Reception and Legacy Awards Luncheon</li> <li>• Branding on all marketing material</li> <li>• Branding in social media campaigns</li> <li>• Five (5) tickets to Legacy VIP Reception</li> <li>• Five (5) tickets to Legacy Awards Luncheon</li> <li>• One (1) Team (4 players) to On the Green Golf Classic</li> </ul>	<b>\$2,500</b>
Community <b>Advocate</b>	<ul style="list-style-type: none"> <li>• Recognition as a National Homeownership Month Sponsor</li> <li>• Corporate logo displayed during the annual VIP Reception and Legacy Awards Luncheon</li> <li>• Branding on all marketing material</li> <li>• Branding in social media campaigns</li> <li>• Two (2) tickets to Legacy VIP Reception</li> <li>• Two (2) tickets to Legacy Awards Luncheon</li> </ul>	<b>\$1,000</b>
Community <b>Member</b>	<ul style="list-style-type: none"> <li>• Branding on select marketing material</li> <li>• Branding in select social media campaigns</li> <li>• One (1) ticket to the Legacy VIP Reception</li> <li>• One (1) ticket to the Legacy Awards Luncheon</li> </ul>	<b>\$500</b>

## Sponsorship Opportunities

Thank you for becoming a sponsor of the Wealth Watchers Inc. National Homeownership Month. Please complete the Sponsorship Form below and submit via email to [info@wealthwatchersfl.com](mailto:info@wealthwatchersfl.com).

Organization Name (as it should appear):

Contact Name:

Address:

Phone:

Email:

Choose your Community Sponsorship Level:

Presenting Sponsor | \$6,000

Stakeholder | \$2,500

Member | \$500

Champion | \$3,500

Advocate | \$1,000

Select one:

Check made payable to Wealth Watchers Inc.

Send an invoice to:

QUESTIONS?

Please send inquiries regarding sponsorship opportunities to [info@wealthwatchersfl.com](mailto:info@wealthwatchersfl.com) or call (904) 265-4736.



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