



*SecureFutures*

formerly Make A Difference — Wisconsin



New name,  
**bigger impact.**

2016-2017 Annual Report



# New name, **bigger impact.**

## Dear Friend,

Daisy floored us with a story on family and financial compassion.

At a conversation between youth and business leaders, Daisy, one of our Money Coach alum, surprised everyone with an anecdote on saving. A first-year college student, Daisy has been working and scrounging to pay for school.

At the same time, her mother just gave birth to a new baby sister. Daisy said she thought about the financial struggles she and her family have had to go through. She knew she didn't want that same tough start for her new baby sister. So Daisy, the college freshman working part-time in retail, started to set aside \$10 from every paycheck toward her new baby sister's future.

Daisy embodies the powerful change that is possible when we give teens the confidence and capability to forge their own financial futures. We seek to make that impact with every single teen we reach.

As we propel our ambitious teen financial empowerment plan forward, we do so under a new name that clearly articulates the change we seek to make in the lives of teens: SecureFutures.

When we surveyed students about the impact of financial literacy, they repeatedly told us it gives them "security" and a "future." Ultimately, it was the input from some of the more than 62,000 teens you've helped us to empower that inspired this new name.

You will find stories and details on our programs, students, volunteers, educators and supporters throughout the pages of this new Annual Report. All of this work – and the work yet to be done – is a testament to your role as a champion for financial education. Our programs reach teens as a direct result of your generosity, your compassion and your belief in making our communities stronger.

We also hope the Annual Report can serve as a guide for the ways we can all work together to make sure every student receives the financial fundamentals and guidance they deserve. Daisy is proof that smart financial behaviors benefit not only the teens we serve, but their families and our communities.

We are so proud to be a part of SecureFutures. And with your support and belief in the teens in our community, we know it's more than a new name – it's a movement.

Warm regards,



**Pam Evason**  
Chairperson



**Brenda Campbell**  
President and CEO

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# 2016-2017 Highlights

## July 2016

Money Sense kicked off its most successful year yet, engaging nearly 8,000 teens during the school year at sites like Racine's J.I. Case H.S.



## September 2016

Money Coach teens and volunteers began monthly mentoring sessions. Divyne, 17, said: "I really needed Money Coach. Now that I've got it, I'm going to be so much better off."



## February 2017

Kuntal Patel and other leaders from Wells Fargo concentrated their Money Sense volunteer efforts on one high school, Milwaukee's James Madison Academic Campus.



## March 2017

Money Path was introduced to students at select sites like Whitnall H.S. Money Path is our technology-based financial planning program that will bring new educational options for teens' financial futures.

## April 2017

Ricky Sandler, a NYC-based investment leader with Wisconsin ties, headlined our 9th Annual Investment Conference. The event also featured a new panel conversation format and raised funds to support more than 6,000 teens with financial programs.

## May 2017

More than 130 Milwaukee and Waukesha teens complete the Money Coach program, capped off by a graduation event with financial conversations and plenty of gratitude.



## August 2017

SecureFutures, our new organization name, is introduced at an event hosted by our Advisory Council and the Milwaukee Bucks. Money Sense alum Fefe Jaber (pictured) and Money Coach alum Sasha Johnson shared how financial education has changed their lives.



# Money Sense

Money Sense has provided thousands of teens with the basics on banking, budgeting, credit and saving since 2006. Hundreds of volunteers from the business community have led Money Sense lessons at more than 200 high schools and community sites in Milwaukee, across Wisconsin and into Chicago.

Through the lessons, it's often the unexpected questions and topics that bring the best teachable moments. Nick, a junior at Noble Street College Prep in Chicago, shared with his class that he had gone way over his budget after trying to impress a date at Navy Pier. Money Sense volunteers Tyler Neenan and Alex Schmiesing put Nick's funny date story into a bigger perspective.



7,953  
students

107  
schools

**“It’s all about choices. Nick was doing well but he could have planned better between his wants and his needs,”**

**volunteer  
Alex Schmiesing said.**

82%

Feel better prepared to make financial decisions

81%

Utilized savings and money management tips

75%

Stopped/decreased use of check cashing stores

45%

Shared info learned with family and friends

23%

Started saving/saved more

16%

Opened a savings account

# Money Coach

Money Coach is our exclusive financial mentoring program. Teens from underserved areas of Milwaukee and Waukesha participate in one-on-one and small group sessions with volunteer “coaches” on lessons that prepare them for life after high school.

With a focus on mentoring and developing lifelong habits, it is the only program of its kind in the country. The impact from students like Rosa, Nina, Jeovanny and Setirah speaks for itself.

## 2016-2017 Money Coach outcomes

46

volunteer money coaches

143

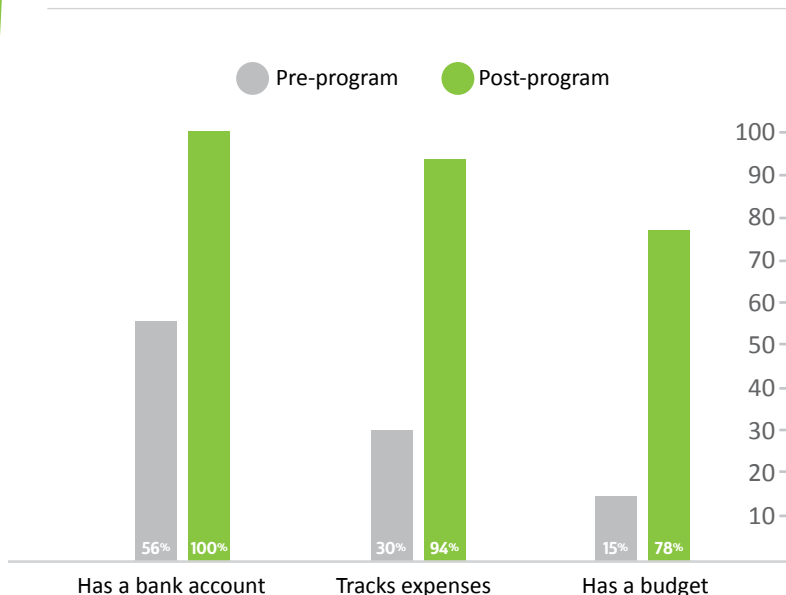
teens

15

schools/sites

\$146,000+

scholarships earned  
since 2013



## Students Speak

“Thank you for helping me know the value of money so that I won’t have to struggle during my adulthood and college years.”



**Setirah**

senior, PEARLS for Teen Girls

“Because of your help, I was able to save for college. Now I have hope in going to college and I can go knowing I have money saved.”



**Jeovanny**

senior, Carmen H.S. of Science and Technology-South

“My Money Coach Joe [Vehec] helped me find ways to decrease my spending every month. Without Money Coach, I wouldn’t even have a budget or save money at all.”



**Nina**

senior, Hmong American Peace Academy

“Most of all, this program has taught me about professionalism and organization, which are major skills in keeping a job. I can certainly say that I have expanded my knowledge from Money Coach and that it will influence my future.”



**Rosa**

senior, Messmer H.S.



# Volunteers



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BMO Harris Financial Advisors

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# Jeff Wozniak carries the impact of teen empowerment everywhere he goes

## 2017 Lloyd Levin Difference Maker

Tucked into the suitcase Jeff Wozniak carries every day is a note from a student at Hmong American Peace Academy. Unprovoked, the student handed Wozniak the card after a Money Sense session a few years ago, to thank the volunteer for teaching him about budgets, banks “and a little bit about the economy.”

Wozniak, 53, a relationship manager with institutional retirement and trust at Wells Fargo, said the note from the student reminds him of the power that comes from learning about personal finance – and the problems that can come without it. It’s also a connection to the dozens of lessons and hundreds of students – at schools ranging from HAPA and JMAC to Banner Prep and Port Washington H.S., where he taught his own daughter – Wozniak has been involved with as a SecureFutures volunteer since 2013.

“For me, I think the kids have probably taught me more than I’ve taught them from the standpoint of the social and economic challenges that a number of them face.”

-Jeff Wozniak

With that compassionate dedication toward teen financial literacy, SecureFutures is proud to announce Jeff Wozniak as the 2017 Lloyd Levin Difference Maker. The Difference Maker Award is chosen by our organization’s leadership to recognize one volunteer’s exceptional commitment to teens in our community.

“Jeff is the definition of a ‘difference maker.’ He is just one of those volunteers who offers his time with students with such eagerness and vigor,” said Brenda Campbell, President and CEO, SecureFutures. “His personal drive to share financial knowledge with people of all ages is a boon to our entire community.”

Wozniak said he was “humbled” by the award. Whether it’s in financial education or something else, he encouraged others to get involved in the lives of the people in their community.

“I think all of us have a passion for something,” he said. “Everyone should take advantage of that passion and find an organization to which they can give back.”





“What we’re doing with these programs is vital, not just for the success of our young people, but for the success of our country.”

-Curt Culver,  
supporter and chairman/former CEO, MGIC

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# BMO proves a solid partner in teen financial empowerment

## 2017 Difference Maker Organization

Across 12 years, name changes and thousands of teens in our community, SecureFutures and BMO remain invested partners in bettering the lives of teens with financial education. Based on that lengthy and generous dedication, BMO has been named the SecureFutures 2017 Lloyd Levin Difference Maker Organization.

BMO has stepped up as the premier sponsor of our major fundraiser, the Investment Conference, which has resulted in tens of thousands of teens receiving financial skills and resources. Since we began in 2006, they have been a steady resource in the classroom, too, with volunteers directly leading Money Sense and Money Coach lessons for high schoolers in Milwaukee, Beloit, Waukesha, Chicago and elsewhere in the region.

“Whether it’s fundraising sponsorship at the Investment Conference or volunteering at a neighborhood high school in Milwaukee or Chicago, BMO is proud to work together with SecureFutures. We are excited to extend these relationships that empower teens with financial skills and guidance for the future.”

–Robert Allbright, Jr., Senior Financial Advisor,  
BMO Harris Financial Advisors

The award is chosen by the board of directors and staff to recognize one organization’s exceptional commitment to our teen financial empowerment mission and vision.

Brenda Campbell, SecureFutures President and CEO, counted herself as “extremely grateful” for the support since 2006 and across multiple divisions of BMO.

“BMO has been a champion for our organization and mission,” said Campbell. “Since day-one, we have known that we can rely on BMO leaders, classroom volunteers, advocacy and event sponsorship.”

**In memorial – dedicated to Vicki Kalman, a compassionate partner in education who passed too soon.**



# New format, exceptional results.

## 9th Annual Investment Conference tops \$300k for financial education

Ricky Sandler, a New York City-based investor with Wisconsin ties, headlined a restyled Investment Conference, the Midwest's leading event for financial professionals and our primary fundraiser for teen financial empowerment programs.

The 9th Annual Investment Conference, held on April 27 in Milwaukee, attracted more than 550 financial leaders to collect intriguing investment tips from Sandler as well as a new duo of investor conversation panels earlier in the day.

**“We as investors and analysts love to value business, love to understand what’s happening, then we operate in the larger marketplace, which can humble you.”**

—Ricky Sandler, CEO, CIO and founder of Eminence Capital

Sandler, who is also an alum and adjunct professor at University of Wisconsin, added: “Emotion and dispassion are really critical when markets can be as extreme as they’ve been over the last eight years.”

All told, sponsorship and seat sales from the event raised more than \$300,000 that will go toward improving financial capability and confidence for approximately 6,500 teens in the region. BMO led as the Premier Sponsor of the event and Godfrey & Kahn hosted a networking reception to round out the afternoon. Curt Culver, MGIC, made a special plea for the attendees to support teen financial education programs “for the success of our country.”

Before Sandler’s keynote Q&A with Joe Schlidt, conference co-chair, five speakers shared investment possibilities in a new discussion panel format. Conference co-chair and board director Mike Kelly asked questions of his “opportunistic” trio of investors, Craig Albert, David Durrant and Colin McWey. Elmer Moore, board director, led the afternoon’s conversations in an “emerging” panel talk with Adam Peck and Andrew Robbins.

The 10th anniversary of the Investment Conference will be held May 17, 2018.



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BMO Wealth Management

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# Speakers

**Ricky Sandler**  
Eminence Capital

**David Durrant**  
UBS

**Craig Albert**  
Sheffield

**Colin McWey**  
Heartland

**Adam Peck**  
Riverwater

**Andrew Robbins**  
Piney Point

SecureFutures thanks BMO, Premier Sponsor of the 2017 Investment Conference, for their incredible generosity in helping Wisconsin teens become "money smart."



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# 2016-2017

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Duane McAllister  
John McDonald  
Patrick McDonough  
Ann Miletti  
Lawrence Moon  
George Mosher  
Bill Nasgovitz  
Tyler Neenan  
David Ness  
James Neubauer  
Rebecca Neumann  
Pat & Grace O'Brien  
Joshua & Kim Palleon  
Tom Parks  
William & Linda Priebe  
Scott & Lindsay Priebe  
Daniel & Nicole Renouard  
Dr. Bernard Rhomberg M.D.  
Susan Rudd-Stover & Doug Stover  
Linda Salchenberger  
Michael Schelble  
Joseph Schlidt  
Mark Schueller  
Emma Schuster  
Jay Schwister  
Onnie Smith  
Christine Smyth  
Susan Lubar Solvang & Oyvind Solvang  
Nathan Stading  
Mary Ellen & Scott Stanek  
Barbara Stein  
Jennifer Stillman  
Pete Syslack  
Janet & Martin Tierney  
Daniel Tranchita  
Sara Walker  
Raymond Wilson

## Supporting Individual Contributors

Michael Adducci  
Matt Adey  
Robert & Elizabeth Allbright  
Sheila & Larry Ashley  
Mark Barker  
David Barras  
Jon Becker  
John Beckwith  
Jeb Bentley  
Adam Berger  
Michael Bogard  
Tom Bolgert  
Theresa Boyd  
Michael Bradburn  
Mitchell Brasch  
Theodore Brettingen  
John Buckel  
Bryan Buford  
John Busby  
Leanne Buttke  
Chris Cahlamer  
Jeremy Cain  
John Carlton  
Andrea Cataldo  
Nan Cleveland  
Dennis Connolly  
Geoffrey Cooper  
Michael Cornell  
Aaron Cross  
David Croysdale  
Joe Dailey  
Jon Debbink  
Trevor D'Souza  
Charles Evans  
Susan Farrell Wustrack  
Barb Feldt  
David Fitzpatrick  
James Fleming  
Jeni Foshey  
Susan Frieber  
Michael Friedman  
Christopher Fugman  
Judy & Mike Garber  
Michael Gauger  
Patty Gaulke  
Bret Goodman  
Michael & Gillian Gosman  
David Greco  
Michael Green  
Debbi Grossman  
Kurt Gunderson  
Fred Haase  
Robert Haddock

Robert Haglund  
Derek Hahn  
Eve Hall  
Brent Hamm  
Todd Haschker  
Barbara Herbst  
Jeremy Hillenbrand  
Brian Hillstrom  
Tim Hoelter  
Kristin Holzhauer  
Dustin Hutter  
Greg Janssen  
Jeff Janza  
Carol & Richard Jochem  
Scott Joers  
Nina Johnson  
Andrew Julian  
Dick Kahn  
Nancy Kaump  
Justin Kern  
Cynthia Kluiber  
Keith & Maureen Kolb  
Pete Koleske  
Anna Kovalenko  
Robert Lanigan  
Peter Lanigan Jr.  
Richard & Patricia Larson  
Gordan Lasic  
Kristi & Jeffrey Leswing  
Eric Lorenz  
Brian & Amy Lucareli  
Salvatore Machi  
Margaret MacLeod Brahm & John Brahm  
John Maddente  
Ruth Maegli  
David Mancl  
Judith Martinez  
Eric Matschull  
Robert McGuire  
Colin McWey  
Ann Megan  
Sahar Milani  
James Miller  
Thomas Miller  
Elmer Moore  
John Mroz  
Jerry Murphy  
Lora Murray  
Rebecca Murray  
Ann & Laird Myrold  
Christopher Nolte  
Brian and Lea O'Day  
Thomas Ognar  
Amedee O'Gorman  
Carisa Oppermann

Adam Peck  
Craig Peterman  
Dave & Janice Powell  
Alan Purintun  
Max & Cindy Rasansky  
Kevin Reardon  
Tom Richtman  
Dan & Kay Rorabeck  
Patrick Rorabeck  
Tim Rorabeck & Alice Stephens  
Mike Ruetz  
Mark Sain  
Denise Salamone  
Casey Sams  
Jennifer San Fillippo  
Shelly & Robert Schaefer  
Bill Schleicher  
Patrick Schmick  
Susan & Steve Schnoll  
Howard Schnoll  
Katherine Schoen  
Michelle Schoenherr  
Michael Schommer  
Jeffrey Schouten  
Victor & Jayna Schultz  
Stacy & David Schulz  
Angela Sell  
Richard Sharpe  
Daniel Sievers  
Ignatius Smetek  
Marylyn & Neal Spear  
Mary Steinacker  
Matthew Sullivan  
Diana Susa  
Megan Susko  
Vito Taphorn  
Amanda Taylor  
Shannon Thurner  
Martha Tsuchihashi  
Kerri Urbanski  
Agnes Vongkhamasay  
Greg Wait  
Wendy Wallace  
Kevin Wanecke  
Robert Watson  
Michael Weckman  
Thomas Wieland  
Robert Wilson & Linda Pirk Wilson  
Lee & Carol Wolcott  
Chaitanya Yaramada  
Richard Yau  
Jeff Young  
Alejandro Zamora Jr.  
Suzanne Zwaska



# 2016-2017 Education Partners

## Milwaukee Public Schools (MPS) & Affiliated Schools

Alliance School of Milwaukee  
Assata Alternative High School  
Bradley Tech High School  
Carmen H.S. of Science & Technology – South  
Community High School  
Golda Meir High School  
Hmong American Peace Academy  
James Madison Academic Campus  
Lad Lake – South  
Lad Lake – Synergy  
Milwaukee Community Cyber High School  
Milwaukee School of the Arts  
Milwaukee School of Languages  
North Division High School  
NOVA  
Pulaski High School  
Riverside University High School  
Ronald Reagan College Preparatory High School  
Rufus King High School  
South Division High School  
Washington High School of Information Technology  
Wisconsin Conservatory of Lifelong Learning

## Milwaukee Choice/Charter Schools

Bader Hillel High School  
Cross Trainers Academy  
Dominican High School  
Eastbrook Academy  
GPS Education Partners: STRATTEC

HOPE Christian  
Messmer High School  
Pius XI Catholic High School  
St. Anthony High School  
St. Joan Antida High School  
St. Thomas More High School  
University School of Milwaukee

## Other Wisconsin Schools

Beaver Dam High School  
Beloit Memorial High School  
Burlington High School  
Connects Learning Center  
Cornell High School  
Cudahy High School  
Denmark Community School  
Dodgeland High School  
Franklin High School  
GPS Education Partners:  
BPM (Peshtigo)  
Bradley Corp (Menomonee Falls)  
Horace Mann High School (Fond du Lac)  
John Dewey Academy (Green Bay)  
Kettle Moraine High School  
La Follette High School (Madison)  
McKinley Academy (Manitowoc)  
Menasha High School  
Mt. Horeb High School  
Mukwonago High School  
Muskego High School  
New Horizons Charter School  
Nicolet High School

Ozaukee High School  
Pardeeville High School  
Pewaukee High School  
Port Washington High School  
The Prairie School (Wind Point)  
Prairie Phoenix Academy (Sun Prairie)  
PRIDE (Appleton Area School District)  
Quest Program (Menomonee Falls School District)  
Racine Case High School  
Racine Horlick High School  
Shorewood High School  
South Milwaukee High School  
Sussex-Hamilton High School  
Union Grove High School  
Waterford Union High School  
Waukesha East Alternative High School  
Waukesha South High School  
Wautoma High School – Crossroads Academy  
West Allis Central High School  
West Allis-West Milwaukee –  
Share Journeys Charter School  
Whitnall High School

## Illinois High Schools

Golder College Prep  
Muchin College Prep  
Noble Street College Prep

## Student/Community Groups

Beloit College – Help Yourself Program  
Boys & Girls Clubs of Greater Milwaukee

City of Milwaukee Earn and Learn  
Cream City Conservation & Consulting  
Department of Juvenile Corrections  
Goodman Community Center (Madison)  
Great Lakes Community Conservation Service Corp.  
Ho-Chunk Nation  
Inspire Your Homeschool Conference  
Lake Valley Camp  
Lead2Change  
Lighthouse Youth Centers – Garden Homes & Havenswoods  
Milwaukee Job Corps Center  
Milwaukee Public Library – Mill Road  
Milwaukee Public Schools – CACC Summer Transition Program  
Milwaukee Urban League event  
Pathways Milwaukee  
PEARLS for Teen Girls  
Silver Spring Neighborhood Center  
Social Development Commission  
Teens Grow Greens  
Upward Bound – Forward Service Corp. & UWM Math and Science  
Urban Ecology Center – Riverside Park  
Urban Underground  
Waukesha State Bank event  
Wisconsin Women's Business Initiative Corp. (WWBIC)  
YMCA of Metropolitan Milwaukee  
Youthbuild Program – AmeriCorps



“Students will tell me years later this helped them get on their feet. It’s almost like someone taking a first-aid class. If done right, it really has that potential to change lives.”

–Armen Hadjinian,  
volunteer and college instructor

# 2016-2017 Leadership and Staff

## Board Members

### Officers

#### Chair

**Pam Evason**

*Windermere Wealth Advisors*

#### Vice Chair

**David Frieder**

*US Bank*

#### Secretary

**Sara Walker**

*Associated Bank*

#### Treasurer

**Nicole Best**

*Heartland Advisors, Inc.*

### Other Directors

**Jeremy Cain**

*Crash Course Driver Education  
Center LLC*

**Mike Conmey**

*Northwestern Mutual*

**Murray Friedman**

*Aurora Healthcare*

**Mike Kelly**

*UBS Financial*

**Lloyd Levin**

*American Fidelity Mortgage Services*

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**Elmer Moore**

*Scale Up Milwaukee*

**Rebecca Neumann**

*UW-Milwaukee*

**Michael Schelble**

*Provident Trust Co*

**Joe Schlidt**

*Godfrey & Kahn, s.c.*

**Christine Smyth**

*The Private Client Reserve at US Bank*

**Nathan Stading**

*BMO Global Asset Management*

**Peter Syslack**

*Wells Fargo Funds*

**Janet Tierney**

*Tierney Grey*

**Daniel A. Tranchita**

*Robert W. Baird, Inc.*

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*WWBIC*

**Bert Bilsky**

*ANON Charitable Trust*

**Wayne Breitbarth**

*Power Formula LLC*

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*Alpha Investment Consulting Group*

**Andrew Burish**

*The Burish Group  
UBS Financial Services, Inc.*

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*Community member*

**Eric Christophersen**

*Northwestern Mutual*

**Lori Craig**

*PNC Wealth Management*

**Fred Croen**

*Retired attorney*

**Curt Culver**

*Mortgage Guaranty Insurance Corp.*

**Michael Falbo**

*Community member*

**Douglas Gordon**

*WaterStone Bank*

**Eve Hall**

*Milwaukee Urban League*

**Gerald Levy**

*Community member*

**Ruth Maegli**

*Milwaukee Public Schools*

**David Mancl**

*Wisc. Dept. of Financial Institutions*

**John McDonald**

*Godfrey & Kahn, s.c.*

**Ann Miletti**

*Wells Capital Management*

**William Nasgovitz**

*Heartland Advisors, Inc.*

**William Priebe**

*Geneva Capital Management*

**Linda Salchenberger**

*Marquette University*

**Mike Sattell**

*Ovation Communities*

**Howard Schnoll**

*RBC Wealth Management*

**Mary Ellen Stanek**

*Robert W. Baird, Inc.*

**Dan Steininger**

*Steininger & Associates, LLC*

**Les Weil**

*Les Weil Consulting, LLC*

**Ray Wilson**

*PwC*

## Staff

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**Ashley Flatland**

*Office Manager*

*ashley@securefutures.org*



# 2016-2017 Financials

## Assets

## 2016-2017

Cash	\$646,286
Pledges receivable	\$45,000
Fixed assets	\$80,940
Less depreciation	\$59,156
<b>Total Assets</b>	<b>\$713,070</b>

## Liabilities and Net Assets

Accounts Payable	\$3,822
Accrued salaries and wages	\$20,230
Accrued expenses	\$14,128
Unrestricted net assets	\$618,990
Temporarily restricted net assets	\$55,900
<b>Total Liabilities &amp; Net Assets</b>	<b>\$713,070</b>

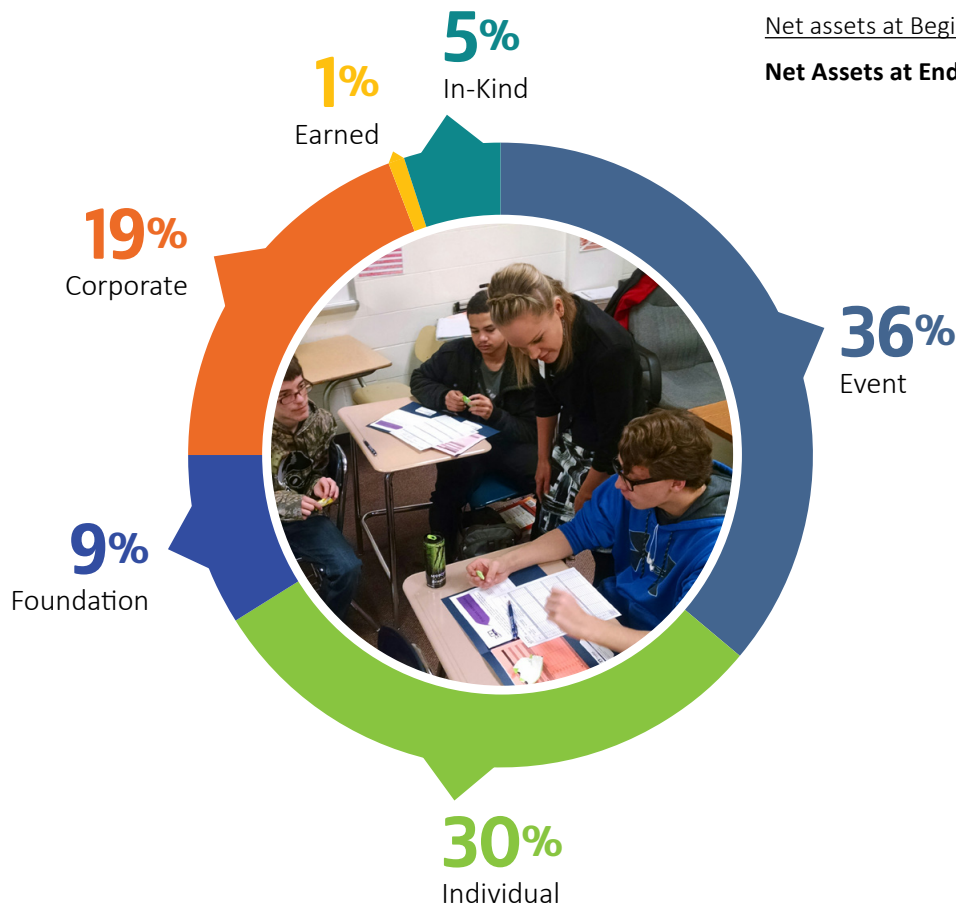
## Gross Revenue

Corporate contributions	\$171,763
Foundation contributions	\$77,175
Individual donations	\$265,037
Special events	\$324,101
In-kind contributions	\$44,611
Interest income	\$997
Other income	\$5,000
<b>Revenue</b>	<b>\$888,684</b>

## Expenses

Program Services	\$583,729
Administration	\$57,137
Development	\$137,679
<b>Total Expenses</b>	<b>\$778,545</b>

Change in Net Assets	\$110,139
<u>Net assets at Beginning of Year</u>	<u>\$564,751</u>
<b>Net Assets at End of Year</b>	<b>\$674,890</b>





## Our Mission

Provide financial literacy programs and resources that empower students to make sound financial decisions

## Our Vision

Build strong communities where students and their families make informed financial decisions and take control of their financial future



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