New name, bigger impact.

2016-2017 Annual Report
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 newAnnual 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

What’s Inside:

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2016-2017 Highlights Money Sense Money Coach Volunteers Volunteers (cont.) Volunteers (cont.) and Difference Maker Organization Investment Conference Investment Conference Speakers and Sponsors Contributors Partner Schools Board and Staff Members Financials
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.

“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.

7,953 students | 107 schools

- 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 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

Pre-program Post-program

Has a bank account 56% 100%
Tracks expenses 30% 94%
Has a budget 15% 78%

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
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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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Angela Stenklyft
Robert W Baird

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

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.”
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.

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.
SecureFutures thanks BMO, Premier Sponsor of the 2017 Investment Conference, for their incredible generosity in helping Wisconsin teens become “money smart.”
2016-2017
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Agnes Vongkhamsay
Greg Wait
Wendy Wallace
Kevin Wanecke
Robert Watson
Michael Weckman
Thomas Wieland
Robert Wilson
Linda Wirks
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

Other Wisconsin Schools
- 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
- 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
- Wauotma 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

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
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Windermere Wealth Advisors

Vice Chair
David Frieder
US Bank

Secretary
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Les Weil Consulting, LLC

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Annual Report created by Becca Mulkey | design@beckmulkey.com
## Assets 2016-2017

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$646,286</td>
</tr>
<tr>
<td>Pledges receivable</td>
<td>$45,000</td>
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<tr>
<td>Fixed assets</td>
<td>$80,940</td>
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<tr>
<td>Less depreciation</td>
<td>$59,156</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$713,070</strong></td>
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</tbody>
</table>

## Liabilities and Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>$3,822</td>
</tr>
<tr>
<td>Accrued salaries and wages</td>
<td>$20,230</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>$14,128</td>
</tr>
<tr>
<td>Unrestricted net assets</td>
<td>$618,990</td>
</tr>
<tr>
<td>Temporarily restricted net assets</td>
<td>$55,900</td>
</tr>
<tr>
<td><strong>Total Liabilities &amp; Net Assets</strong></td>
<td><strong>$713,070</strong></td>
</tr>
</tbody>
</table>

## Gross Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate contributions</td>
<td>$171,763</td>
</tr>
<tr>
<td>Foundation contributions</td>
<td>$77,175</td>
</tr>
<tr>
<td>Individual donations</td>
<td>$265,037</td>
</tr>
<tr>
<td>Special events</td>
<td>$324,101</td>
</tr>
<tr>
<td>In-kind contributions</td>
<td>$44,611</td>
</tr>
<tr>
<td>Interest income</td>
<td>$997</td>
</tr>
<tr>
<td>Other income</td>
<td>$5,000</td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td><strong>$888,684</strong></td>
</tr>
</tbody>
</table>

## Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>$583,729</td>
</tr>
<tr>
<td>Administration</td>
<td>$57,137</td>
</tr>
<tr>
<td>Development</td>
<td>$137,679</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$778,545</strong></td>
</tr>
</tbody>
</table>

## Change in Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Net Assets</td>
<td>$110,139</td>
</tr>
<tr>
<td>Net assets at Beginning of Year</td>
<td>$564,751</td>
</tr>
<tr>
<td><strong>Net Assets at End of Year</strong></td>
<td><strong>$674,890</strong></td>
</tr>
</tbody>
</table>

### Revenue Sources

- **19%** Corporate
- **9%** Foundation
- **36%** Event
- **5%** In-Kind
- **30%** Individual
- **1%** Earned
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

SecureFutures
Money Smart. Life Smart.

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securefutures.org | (414) 273-8101