



Money Smart Teens

Stronger Communities

A ripple effect year

“You are helping me help other people around me. And you probably don’t realize it, but you are saving lives.” -Dejah

Dear Friend,

Stories like these from our teens about the ripple, or butterfly, effect of SecureFutures financial literacy programs are eye-opening. More and more we hear that the teens in our program are not the only ones to benefit from our money smart lessons. Teens take what they learn and share it with parents, siblings, extended family, and friends, helping their families and community become financially wiser and stronger.

Although a recently passed state mandate recognizes the need for financial education in Wisconsin schools, our programs are more important than ever. In fact, a generous new donor has funded an additional program manager position so we can double our reach with Money Coach in the next year. And, we continue to seek new partners and ways to deliver content and encourage teen participation.

With these goals in mind, we’re excited to launch our third financial literacy program – Money Path – made possible through the generosity of Bill Nasgovitz and Heartland Advisors. Money Path, which will include a web-based app, will meet teens where they “live” – with technology, and

show them how every decision they make today affects their financial success tomorrow.

Our goal for 2018-2019 is to reach 9,000 teens with our programs. With passionate, caring individuals and corporate partners like you, a stronger community is possible. We are grateful for all those who enable us to build teen financial confidence and show them how best to participate in the financial world in order to reach their goals.

Through teen financial education and empowerment – and the ripple effect to their family and friends – you are changing lives, and improving our community!

With gratitude,



David Frieder
Chairperson



Brenda Campbell
President and CEO



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Money Sense

Since inception in 2006, Money Sense has provided thousands of teens with critical skills in banking, budgeting, credit and saving. This program would not be available to students if not for our volunteers. We are proud to have hundreds of business community volunteers that led the Money Sense lessons at more than 200 schools and community sites in Milwaukee, across Wisconsin and Chicago.

2017-2018 Year

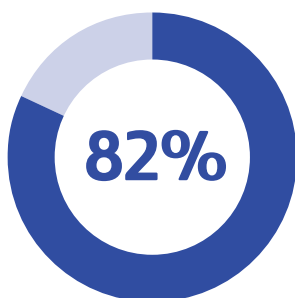
7,278

Students

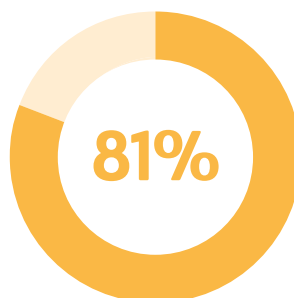
111

Partner Sites

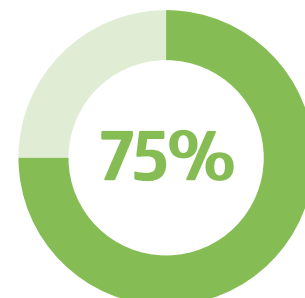
Money Sense Outcomes since 2006



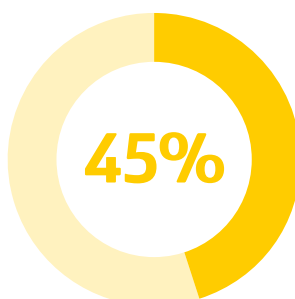
Feel better prepared to make financial decisions



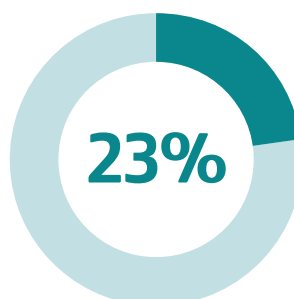
Utilized savings and money management tips



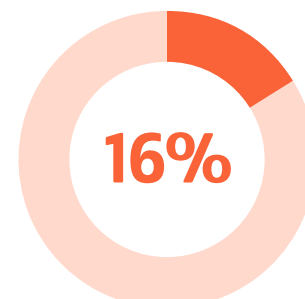
Stopped/decreased use of check cashing stores



Shared info learned with family and friends



Started saving/saved more



Opened a savings account

“

Warnings against things to avoid; makes it easier to stay financially stable when I know what to look out for.

– Money Sense student at Carmen Southeast

“

The most helpful part of this course was credit because I want to be able to get loans with a good credit score.

– Money Sense student at Eastbrook

”



Money Coach is our exclusive financial mentoring program that matches underserved teens with business community volunteers who coach them one on one as they put newly learned financial concepts into practice.

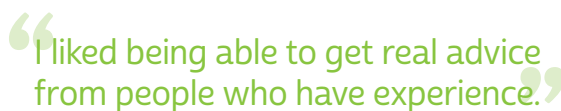
Money Coach provides both financial education as well as a caring and committed adult to guide teens' financial decision-making into adulthood.

52 coaches 229 teens 14 partners
(18 programs)

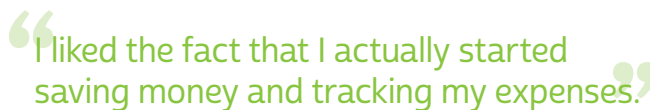
\$219,000+
scholarships earned since 2013

A bar chart comparing three financial literacy skills across three program groups: Pre-program (yellow), Post-program (green), and Longitudinal (blue). The y-axis represents the percentage of individuals, ranging from 0 to 100. The x-axis lists the skills: 'Has a bank account', 'Tracks expenses', and 'Has a budget'. The data is as follows:

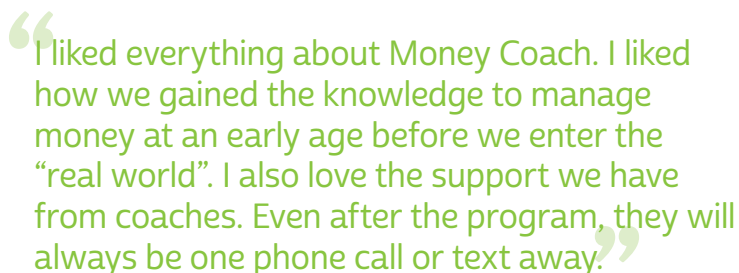
Skill	Pre-program	Post-program	Longitudinal
Has a bank account	56%	100%	98%
Tracks expenses	32%	93%	79%
Has a budget	19%	83%	71%



– Valeria Orozco, Carmen High School



– Rozerricka Ruffin



– Eliyah Lock

“

I didn't even know tools like this existed. This knowledge is majorly important.

-STUDENT

”

“

This program meets the need to lessen the anxiety of making the right decision within life's many options by letting students try out some possible outcomes.

-EDUCATOR

”

“

It looks fantastic! You are all doing wonderful work, our students are so lucky to have you on their side.

-EDUCATOR

”

Introducing Money Path: a New Program in 2018-2019

Shows teens how their decisions today impact their tomorrow

Money Path is our newest innovation in equipping teens with the tools for financial freedom. Sponsored by Heartland Advisors Inc., this advanced financial learning software allows students to explore how decisions about college, career, budgeting, and saving will impact long-term goals and lifelong financial success.

Money Path centers on a cutting-edge web-based application with intuitive, step-by-step simulation allowing students to compare and contrast the effects of their choices after high school. Business community volunteers guide students through how to use the app and equip them with financial planning principles as they work toward the habits and goals that will secure their futures.



Volunteers



Jon Adams
BMO Harris

Nkenge Adams
Northwestern Mutual

Daniel Adler
Park Bank

Jose Aguilera
PyraMax Bank

Heidi Albert
Live It To Learn It, Inc.

Mark Albertson
OneAmerica

Robert Allbright
BMO Harris Financial Advisors

Lindsay Allen
Summit Credit Union

Lori Allen
Associated Bank

Robert Allen

Rebecca Amundson
Associated Bank

Kristine Ashe
Park Bank

Donald Balchunas

Stephanie Balgeman
Strata Decision

Kris Barger
First Bank Financial Centre

Laura Barry
Bronfman Rothschild

Marta Bartolacci
Charles Schwab

Annette Bass
City of Milwaukee

David Beatty
US Bank

John Beckwith
Associated Bank Retiree

Norm Behling
Namron Holdings LLC

James Bell
Northwestern Mutual

Charles Benjamin
Independent Pharmacy Coop

Takeyla Benton
Park Bank

Bro Berg

David Berg
Johnson Controls Retiree

Frank Berger

Don Betters
Broan-NuTone

Marilyn Beug

Mary Blackburn

Stacy Blahnik
UnitedOne Credit Union

Teri Block
Associated Bank

Carla Bodway
Waukesha State Bank

Tracy Bouzek
Summit Credit Union

Antonio Braddock
Ageatia Global solutions

Joseph Bree
US Bank

Nicol Britten
Goodwill Industries SEW

Bryan Buford
US Bank

John Buran
OneAmerica Retirement Services

Emily Buretta
Dedicated Computing

Joanne Burnham
Summit Credit Union

Tiffany Cacciotti
Tri City National Bank

Frank Callero

Lee Carey
Coldwell Banker

Lauren Casillas

Janis Cava
Northwestern Mutual

Jaimie Charon
WWBIC

Susan Chase

Wendy Ciekliniski
PyraMax Bank

Brad Clark
Park Bank

Ben Clarke
Godfrey & Kahn, S.C.

Shawn Clausing

Catina Cole
Milwaukee Fire Department

Christopher Coleman
Northwestern Mutual

Kara Coleman

Karyn Conklin

Neil Conway
BMO Harris Financial Advisors

Nick Costello
Robert W Baird

Aaron Cross
BMO Harris Financial Advisors

Darlene Curtis
Associated Bank

Dina Dakwar
Northwestern Mutual

Laura De La Cruz
PyraMax Bank

Tabatha De Leon
WINTRUST Mortgage

Jon Debbink

Jeffrey Debele
General Mills

Jenny DeCeuster
First Bank Financial Centre

Kent Demien
Cleary Gull

Michael DiMaggio
Shore Capital Partners

Jessica Domek-Hernandez
First National Bank & Trust Co

Jack Donovan

Robert Draper
Marietta Investment Partners

Rachel Dumke
First Bank Financial Centre

Jennifer Dunning
Northwestern Mutual

Sandra Dunst
MGIC

Carley Duren
US Bank

Jill Economou
Ellenbecker Investment Group

Linda Edmondson
Connected Communications

Que El-Amin
Young Enterprising Society

Margo Elborough
MGIC

Allyn Emery
Peshtigo National Bank

Charles Evans
Marietta Investment Partners

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Cohen & Company

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Milwaukee Urban League

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CUNA Mutual Group

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Wells Fargo Asset Management

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Primerica Financial Services

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Aaron Frank
Waukesha State Bank

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Aurora Health Care, Inc.

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CIBC

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BMO Harris Financial Advisors

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First Bank Financial CentreKarla Hill
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Dell EMCScott Jonas
SDJ ConsultingMaria Genke
Horicon BankJared Greanya
Northwestern MutualMichael Harris
Northwestern MutualBrian Hillstrom
Johnson BankMarcell Jackson
GE HealthcareBarbara Jones
BMO Harris BankSara Gobin
Summit Credit UnionJonathan Grelk
Dedicated ComputingJames Hartz
Associated BankMichael Hodan
Wells Fargo AdvisorsSheila Jackson
Northwestern MutualHeather Jordan
Tri City National BankPhilip Godager
Alpha Investment Consulting

Kristi Guay

Aidan Hauge
Summit Credit UnionRebecca Holmes
Captain Save A Home LLC

Michael Janikis

Richard Judd
Associated BankTomer Goldstein
WHG HospitalityBrian Gust
Wells FargoJames Hauser
Tri City National BankWarwees Holt
Social Development
CommissionJessica Johanson
Lord, Abbett & Co.Andrew Justus
Associated BankJustin Goninen
Morgan Stanley Wealth
ManagementMark Gustin
Robert W. Baird & Co., Inc.Heather Heflick
Comm Action Inc Rock &
Walworth Co

Charlie Houser

Christopher John
Northwestern MutualLarry Juszczak
Fairway Independent
Mortgage CorpBret Goodman
Bret Goodman MarketingKristine Gutierrez
Park BankJohn Heimsath
WaterStone BankChristine Howard
Ogden RealtyAJ Johnson
Wells Fargo Asset ManagementMaya Kamath
Guardian Credit Union

Kenneth Gowin

Armen Hadjinian
MATC/The Armen Group

Amy Heinz

Eli Howayceck
Crafted Career ConceptsBrandy Johnson
Wells Fargo Home MortgageJeremiah Kath
Bronfman RothschildDanisha Graham
City of Milwaukee - Real EstateJoseph Hake
Goldman SachsPaul Henning
cre8vstrategy LLCAnne Hughey
UBS Financial Services Inc. -
The Burish GroupSuzanne Johnson
Park BankLaurence Kaye
Wells Fargo Home MortgageJon Grandelis
Woller-Anger, Inc. LLC

Carrie Hansen

Paul Hickerson
GE HealthcareValerie Johnson
Sikich Financial

Eddie Nash has been all in from the very beginning

2017 Lloyd Levin Difference Maker

When Eddie Nash signed on as a volunteer in the Money Sense program, he did not just dip a toe in, he jumped in full force. In just one year, Nash logged nearly 25 hours presenting Money Sense lessons at Transitions High School, Eastbrook Academy, Employ Milwaukee, Brown Deer High School, the MPS Youth Summit event, as well as with teens in an internship program at We Energies.

“We are teaching young members of the community how not to be bound to debt and financial mismanagement. We encourage them to believe they can live better lives by practicing and adhering to the principles taught in Money Sense.”

-EDDIE NASH

With that passion and dedication for teen financial literacy, SecureFutures is proud to announce Eddie Nash as the 2018 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.

Nash has been a We Energies team member for 26 years advancing from a power line mechanic to Operations Manager. In addition to time spent teaching Money Sense, he serves as the Associate Minister at the Way of the Cross Missionary Baptist Church, where he has been a member for 23 years. Carving out time for volunteering in the community is an important value for him and it shows. “It's truly a blessing for me to be able to help,” he said.

“Eddie has the distinction of being the only SecureFutures volunteer to be invited to give the commencement address at one of our partner schools, said Kathy Weinberg-Kinsey, Volunteer Manager, SecureFutures.

“This is simply based on the admiration and respect he earned while presenting Money Sense.”





Volunteers (cont.)

Amanda Keckler Park Bank	Doug Levy	Candace Mortl Horicon Bank	Ellen Redeker CIBC Retiree
Shaneeka Kelly First Citizens Bank	Elizabeth Lijewski Waukesha State Bank	John Mroz Northwestern Mutual	Alex Redenius McFarland State Bank
Ann Kienast Old National Investments/LPL Financial	Robert Loppnow Associated Bank	Jane Murphy Waukesha State Bank	Katie Reiners Waukesha State Bank
Thomas Kingston Insperity	Margarita Madrigal Chavez PyraMax Bank	Jerry Murphy MGIC	Helen Reynolds First Citizens Bank/BestBank
Meghan Kinsella J.P. Morgan	John Major American Deposit Management	Melissa Musial OneAmerica	Zackery Reynolds Summit Credit Union
MacArthur Kirksey II EY	Allison Malone Northwestern Mutual	Eddie Nash We Energies	Stephen Rice OneAmerica
Gregory Knott Associated Bank	Tameko Malone Northwestern Mutual	David Navarre Godfrey & Kahn, S.C.	Jody Robinson PyraMax Bank
Nick Knox III Captain Save A Home LLC	Sean Mannion Keane Consultants	Tyler Neenan BlackRock	Tracey Rodgers We Energies Retiree
Raymond Koepcke Park Bank	Max Maroney Park Bank	Amy Nelson UnitedOne Credit Union	James Roemer CIBC
Jason Kofroth OneAmerica Retirement Services	Mont Martin Wiernick, Martin & Neumaier, S.C.	Rebecca Neumann UW Milwaukee	Patrick Rohde Morgan Stanley Wealth Management
Brittany Komorowski Financial Service Group	Suzanne Massel	Zach Newcomer Ziegler Capital Management, LLC	Jaquilla Ross
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William Korducki We Energies	Erin McCarthy WaterStone Bank	Tabi Nsiah OneAmerica Retirement Services	Laura Saavedra Guardian Credit Union
Matthew Kostuck BMO Harris Bank	John McDonald Godfrey & Kahn, S.C.	Frank Olson Prime Financial Credit Union	Gabriella Saenz Northwestern Mutual
Richard Krauthoefer First Business Bank	Patrick McDonough Milwaukee Bucks LLC	Ryan Otto Horicon Bank	Dion Saffold Northwestern Mutual
Dave Krug Ace Distribution Services, Inc.	Allen McIlwraith Johnson Bank	Vincent Panzarella	Denise Salamone Milwaukee Business Journal
Stacy Krygier Bevara Building Services	Karen McKee BMO Harris Bank	Thomas Parks Annex Wealth Management	Stacy Scheffer Charter Manufacturing
Anthony Kuehn Northwestern Mutual	John McNally CollabNet, Inc.	Tristaca Patrick-Yarbrough Alt in Psych Consultation, S. C.	Joseph Schlidt Godfrey & Kahn, S.C.
Timothy LaBelle CFG	Juan Medina	Mark Pent UBS Financial Services Inc -The Burish Group	Timothy Schlidt Madison Dearborn Partners
Francisco Langner Park Bank	Joel Michel OneAmerica	Craig Peterman Prism Wealth Management	Paul Schmerse Associated Bank
Melissa LaRocque UnitedOne Credit Union	Angela Mierzwinski Waukesha State Bank	Mark Pollack Pollack ADR, LLC	Sharon Schmid Robert W. Baird
Richard Larson	Devin Millard Independent Pharmacy Coop	Anne Potkay US Bank	Kimberly Schmoltdt Direct Supply
Frank Lauck Jr National Insurance Services	Edward Miller Enterprise Credit Union	Daniel Pulliam Wells Fargo	Jeffrey Schouten Annex Wealth Management
Jonathan Lauersdorf Park Bank	William Mills UBS Financial Services Inc. - The Burish Group	Bhargavi Rahatekar	Jacob Schroeder OneAmerica
David Lawrence City of Milwaukee	Christine Mitchell Associated Bank	Jill Rakauski Penn Rakauski	Peter Schumacher Cleary Gull
Robert Leinss	Sherri Mitchell Northwestern Mutual	Nancy Rasmussen	Andria Sewell-Cotton First Citizens Bank
Stacy Leuty	Clay Monahan Cascade Energy	Brian Rauguth Wells Fargo Asset Management	Keith Shepard Waukesha State Bank
Lloyd Levin American Fidelity Mortgage Services, Inc.	Darrell Moore Empower Retirement		Shay Sherfinski R&R Insurance

Wells Fargo: A champion of SecureFutures, financial literacy, and our community

2018 Difference Maker Organization Award Winner

Since 2009 Wells Fargo has supported the mission of SecureFutures. Through financial support and volunteerism, Wells Fargo is an invested partner committed to teen financial literacy and capability. SecureFutures is proud to name Wells Fargo as the 2018 Lloyd Levin Difference Maker organization.

The Wells Fargo financial investment in SecureFutures, and ultimately of teens in our community, has been through a variety of means, including program funding and sponsorship of our annual investment conference. The Wells Fargo investment to date totals more than \$130,000 – enough to support more than 2,500 of the students served in SecureFutures programs.

Wells Fargo is also a champion of our volunteer recruitment efforts and encourages employees to get involved and give back to the community. Since SecureFutures' program inception, 68 Wells Fargo volunteers have been involved, and during the 2017-2018 year, SecureFutures benefited from 31 active volunteers from Wells Fargo.



“Financial literacy is a key area of focus for Wells Fargo. We are proud to support SecureFutures because we see the impact that it makes with the teens and our community.”

-PETE SYSLACK,
Defined Contribution Practice Leader, Institutional Client Services

Wells Fargo Asset Management

The award is chosen by organization leadership to recognize one organization's exceptional commitment to our teen financial empowerment mission and vision.

“SecureFutures needs both financial and volunteer resources to empower teens with financial capability, and Wells Fargo is a strong and committed partner,” said Brenda Campbell, President and CEO, SecureFutures. Campbell said she is “proud and honored” to have Wells Fargo executive representation on the board of directors and advisory council. Pete Syslack has served on the board since 2016, and currently serves as an officer, and Ann Milette has served on the advisory council since 2012.

Rebecca Sherman
Live It To Learn It, Inc.

Shawna Sherry
Park Bank

Walter Silverman
Wells Fargo

Dejunae Smith
First Citizens Bank

Harish Sriram
Houlihan Lokey

Andrew Steeno
Sam P and Mary Little, Ltd.

Eliana Stein
Functionaire

Chris Steinhafel
Wired Properties

Angela Stenklyft
Robert W Baird

Jennifer Stillman

Robert Stoehr

Kyle Stone
UFS

Joyce Stoner
A.O. Smith Corp.

Gus Straub
First Bank Financial Centre

Michael Sullivan
OneAmerica Retirement
Services

Megan Susko

Daniel Sweeney
Wells Fargo

John Sylla
U.S. Bank

Marwah Tamim-Koss
Park Bank

Amanda Taylor
SJA Financial Advisory

Michael Thelen
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First Bank Financial Centre

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Summit Credit Union

Laura Thornton
PyrMax Bank

Juliet Urso
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Teriann Van Sistine
Associated Bank

Joseph Vehec
PNC Bank

Molly Venturini
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Erick Vertein
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Jeffrey Victor

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Wells Fargo Asset Management

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Stephen Wacławski
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Kathleen Walker
Shorewest Realtors

Wendy Wallace
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Kevin Wanecke

Michelle Ward
The Equitable Bank

Ranell Washington
Town Bank

Teresa Watry
MGIC

Angela Webb
WEC Energy Group (We
Energies)

Chiia Weber
Tri City National Bank

Britt Wegner
Gimbel, Reilly, Guerin & Brown

Meghan Wein
WaterStone Bank

Katrina Weinberg
First Citizens Bank

William Weisgerber
Northwestern Mutual

Lindsay Whalesmith
Northwestern Mutual

Claudia Wiederholt
Park Bank

Tammie Wiley
Northwestern Mutual

LaShawnda Wilkins
Speak Life Motivation

Nicole Willette
Franklin Energy

Artia Williams
First Citizens Bank/BestBank

Robert Wilson
Wilson CFO

Julie Wirth
Park Bank

John Wong
BMO Harris Financial Advisors

Jayzaria Woodley
First Citizens Bank

Jeffrey Wozniak
Wells Fargo

Beatrice Zamarripa
Beal Service Corp

Alejandro Zamora Jr
J.P. Morgan Private Bank

10 Years, \$1.7 million raised

10th annual Investment Conference delivers record support

The annual SecureFutures Investment Conference was held May 17, 2018 at the Hyatt Regency Milwaukee. The conference was attended by 576 individuals and produced record-breaking net revenue of more than \$302,000.

In keeping with our tradition of outstanding keynote speakers, David Herro, a Chicago-based investor with Wisconsin ties, headlined the conference. Event Emcee Joe Schlidt hosted an informal interview with Herro, who shared lessons learned and his investing and market insights. Insight included:

Inactive management is one of the biggest causes of failure.

“You have to be prepared to be unpopular with clients. They’re paying you to make a sound decision for them, and you have to stick to it.”

-David Herro, Partner, Deputy Chairman,
Portfolio Manager and CIO of Harris Associates



Be a patient investor both on the upside and the downside.

You don’t ever want to worry what an economic slowdown will do to a company. If it has to raise money, it’s not going to be a good curve.

The conference proceeds will enable SecureFutures to help more than 6,500 teens in the region improve their financial capability by providing them the tools to participate and be confident moving forward in the financial world. BMO led as the Premier Sponsor of the event. Wayne Breitbarth, nationally known author and speaker, made a special plea for attendees to support the SecureFutures Money Coach scholarship fund to benefit underserved teens and “change lives.”

Before Herro’s keynote, six speakers shared investment ideas in a panel format. Conference co-chair and board director Mike Kelly asked questions of an “emerging manager” panel, including Larissa Herczeg, Scott Kimball, and Michael Underhill. Bob Bukowski, SecureFutures advisory council member, led a conversation with an “alumni” panel of former conference speakers Rick Lane, Ignatius Smetek, and John Thompson.

Our sincere appreciation to our premier sponsor, BMO, and all speakers, sponsors and attendees for once again helping us with our mission to help teens become money smart and life smart!

The 11th annual Investment Conference will be held on May 14, 2019.

securefuturesconference.com

Sponsors

PREMIER	BMO Global Asset Management BMO Wealth Management
NETWORKING	Godfrey & Kahn, s.c.
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Speakers

Keynote: David Herro, Harris Associates

ALUMNI PANEL

Rick Lane **Ignatius Smetek**
Broadview Advisors Arcataur Capital Management

John Thompson
Vilas Capital Management

EMERGING MANAGER PANEL

Larissa Herczeg **Scott Kimball**
Oak Street Real Estate Capital BMO Global Asset Management

Michael Underhill
Capital Innovations

SecureFutures thanks BMO, Premier Sponsor of the 2018 Investment Conference, for their incredible generosity in helping Wisconsin teens become “money smart.”



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 Josephine Farley and Howard M. Packard Memorial Fund
 Krause Family Foundation
 Krause Woodhaven Foundation
 Luedke-Smith Fund
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 MGIC
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 Adam Peck
 Michelle Picard
 William Priebe
 Alan Purinton
 Poul Rasmussen
 Ellen Redeker
 Bernard Rhomberg
 Glen Ringwall
 Patrick and Lori Rorabeck
 Susan Ruud-Stover and Doug Stover
 Michael Schelble
 Joseph Schlidt
 Dean Schmelzer
 Howard Schnoll
 Mark Schueller
 Victor and Jayna Schultz
 Daniel Sievers
 Chris Sleggs
 Onnie Smith

Christine Smyth
 Nathan Stading
 Mary Ellen Stanek
 Barbara Stein
 Mike Sturm
 Pete Syslack
 John Thompson
 Janet and Martin Tierney
 Daniel Tranchita
 Sara Walker
 David Waters
 Les Weil
 Robert Wilson
 Raymond Wilson
 Brian Wolf
 Steve Young
 Herb Zien

Supporting Individual Contributors

Michael Adducci
 Alice Ambrowiak
 Mark Anderson
 David Arnstein
 Donald Balchunas
 Wendy Baumann
 Graham Baxter
 John Beckwith
 Mr. and Mrs. Floyd Bellman
 Charles Benjamin
 Michael Bernhard
 Timothy Black
 Eli Blee -Goldman
 Robert Bloch
 Tom Bolgert
 Michael Bradburn
 James Breitenkamp
 Michael Bruno
 Bryan Buford
 Leanne Buttk
 Chris Cahlamer
 Jeremy Cain
 Filippo Carini
 Alexandra Carlson
 John Carlton
 Andrea Cataldo
 Steve Chernof
 Rebecca Chriske
 Betty Chrustowski
 Nicholas Chuminatto
 Kristen Cleary
 Peter Coffey
 Dennis Connolly
 Neil Conway
 Jodi Coplan
 Nick Costello
 William and Lu Ann Crain
 William Crowley

David Croysdale
 Jon and Denise Debbink
 Mary Sharon deGuzman
 Dominic DeMondo
 Lance Donenberg
 Brian Durst
 Michael Dwyer
 David and Ellen Easley
 Charles Evans
 Brad Feltz
 James Fleming
 Susan Friebert
 Michael Friedman
 Murray Friedman
 Jessica Fritz
 Michael Frohna
 Ryan Fuerst
 Michael Gauger
 Brett George
 Roxane and Rick Godager
 Craig Goldsmith
 Bret Goodman
 Linda Gorens-Levey
 Mary Gosewehr
 Michael Gosman
 Donald Grande
 Michael Green
 Andy Gronik
 Debbi Grossman
 Robert Haddock
 Eve Hall
 Carolyn Handler
 Art Harrington
 David Heiny
 Brandon Henak
 Barbara Herbst
 David Hermann
 Joe Hickey
 Jeremy Hillenbrand
 Eli Howayeck
 Joel Huffman
 James and Laura Hyland
 Ann Jacobs
 Greg Janssen
 Scott Joers
 Dick Kahn
 Jody Kaufman Loewenstein
 Julie Kelley
 Mary Kempf
 Michael Kennedy
 Henry and Joan Kerns
 Scott Kimball
 Joan Klimpel
 Mike Klinker
 Todd Klumb
 Jason Kohout
 Peter Koleske
 Thomas Koplin

Eric & Lucy Korbitz
 Anthony Krausen
 Richard and Mary Krauthoefer
 Andrew Krei
 Joe Kren
 Rachel LaMantia
 Kristi Leswing
 Brian and Amy Lucareli
 Casey Lura
 Salvatore Machi
 John Maddente
 Leslie Malicki
 David Manc
 Rob Manegold
 Michael Mann
 Susan Martin
 Judith Martinez
 Jason Martone
 Mark Meier
 Michele Meier
 Chris Merker
 Carl Meyer
 James Miller
 Thomas Miller
 Elmer Moore
 Lora Murray
 Rebecca Murray
 Ann and Laird Myrold
 Tyler Neenan
 Brandon Nelson
 David Ness
 Matt Nitka
 Christopher Noyes
 Brian and Lea O'Day
 Carisa Oppermann
 Nikolay Panchev
 Andrea Pasqualetto
 Pratik Patel
 William Pauly
 David Perrigo
 Craig Peterman
 Brittany Peters
 Lynn Petzold
 David Powell
 Carey Provan
 Yulie Qiao
 Fred Raasch
 Paul Ramus
 Jason Rector
 Andrew Rehorst
 William Rogalinski
 Rich Rokus
 Kay Rorabeck
 Manuel Rosado
 Jerry Rossi
 Ronald Sadoff
 Casey Sambs
 Jennifer San Fillippo
 Stephanie Sargent

CONTINUED ON NEXT PAGE...

Supporting Individual Contributors (cont.)

Michael Sattell
Barbara Schalla
Timothy Schlidt
Patrick Schmick
Kimberly Schmoldt
Katherine Schoen
Michael Schommer

David Schroeder
Elizabeth Schroeder
John Schroeder
Jason Schultz
Thomas Schuster
Robert Sharpe
Stephen Shenkenberg
Diane Sherwin
Christine Shirer
Ronald Skaug
Ignatius Smetek
Phil Smith

Adam Spector
Erin Stanek
Terry Stegen
Farrah Stephan
Alice Stephens
Charles Stevens
Kyle Stone
Megan Susko
Saleh Tabrizy
Jonathan Tan-Yan
Makela Taphorn
Amanda Taylor

Brian Thiel
Stuart Thomas
Nate Tiziani
Eric Trau
Ernest Troutman
Kristiyan Trukov
Patti Ulwelling
Jennifer Vallier
Marc Van Bell
Diane Veenendaal
Maclovio Vega
Agnes Vongkhamsey

Nic Wahl
Greg Wait
Ed Wallace
Wendy Wallace
Kevin Wanecke
Mark Wanek
Teresa Watry
Robert Watson
Benjamin Wedro
Jim Wenzler
Cheryl Werner
Corbin Weyer

Jay Wigdale
Tina Wisialowski
Lee and Carol Wolcott
Jeffrey Wozniak
Jeff Young
Athanasia Zavakov
Joe Zidanic
Mark Ziehr

2017-2018 Education Partners

Milwaukee Public Schools (MPS) & Affiliated Schools

Assata High School
Audubon Technology & Communications Center High School
Bradley Tech High School
Carmen High School of Science & Technology - Northwest
Carmen High School of Science & Technology - South
Carmen High School of Science & Technology - Southeast
Grandview High School
James E Groppi High School
Hmong American Peace Academy
James Madison Academic Campus
Lad Lake Synergy South
MacDowell Montessori
Milwaukee Community Cyber High School (MC2)
Milwaukee Marshall High School
NOVA-Northwest Opportunities Vocational Academy
Project STAY
Pulaski High School
Riverside University High School
Ronald Reagan College Preparatory High School
Rufus King International School
South Division High School
Transition High School
Washington High School of Information Technology

Milwaukee Choice/Charter Schools

Cross Trainers Academy
Destiny High School
Dominican High School

Eastbrook Academy
El Puente High School
HOPE Christian High School
Messmer High School
Milwaukee Academy of Science
Milwaukee Collegiate Academy
Pius XI High School
St. Anthony High School
St. Joan Antida High School

Other Wisconsin Schools

Appleton West High School
Beloit Memorial High School
Brown Deer High School
Burlington High School
Catalyst Academy
Connects Learning Center
Cornell Middle/High School
Denmark Community School
Dodgeland High School
Franklin High School
Germantown High School
GPS Education Partners:
Badger (Peshtigo)
Bradley Corp (Menomonee Falls)
Hustisford High School
Kettle Moraine High School
Robert M. LaFollette High School (Madison)
McKinley Academy & Manitowoc County Charter School
Menasha High School
Mount Horeb High School
Nathan Hale High School
New Horizons Charter School (Shorewood)

Nicolet High School
Norris Academy
Pardeeville High School
Pewaukee High School
Port Washington High School
Prairie Phoenix Academy (Sun Prairie)
Quest Program (Menomonee Falls School District)
Racine Park High School
Shorewood High School
South Milwaukee High School
Waterford Union High School
Waukesha East Alternative School
Waukesha South High School
West Allis Central High School
West Allis-West Milwaukee/Shared Journeys Charter School
Whitnall High School

Student/Community Groups

AmeriCorp-Youthbuild Program
Beloit Fresh Start - CAI Pathways Center
City of Milwaukee Earn and Learn Program
Cream City Conservation & Consulting: Escuela Verde
River Revitalization Foundation
Cream Skills, Inc.
Employ Milwaukee
Goodman Community Center (Madison)
Ho Chunk Nation
Homeschool Co-Opportunities (Green Bay)
Journey Forward Conference (MPS)
Lead2Change
Lighthouse Youth Center - Havenswood
MC3 Training Program (organized by WRTP/Big Step, MATC, MPS & Milwaukee Bucks)

Milwaukee Job Corps
Milwaukee LGBT Community Center
Milwaukee Public Library- Teen Internship Program
Milwaukee Urban League
MPS REC (ArtWorks, Playgrounds /Community Centers)
Neighborhood House Milwaukee
Neu-Life
Pathways Milwaukee
PEARLS for Teen Girls
Portal Inc.
Project Excel
Social Development Commission
St. Charles Youth & Family Center
Teens Grow Greens
Upward Bound UWM Math and Science
United Community Center
Urban Underground
Vel R. Phillips Juvenile Justice Center
Waukesha State Bank community event
WE Energies
WI Women's Business Initiative Corp.
Youth as Resources - United Way of Racine County

Illinois High Schools

CircEsteem (Chicago)
Gary Comer Youth Center (Chicago)
Girl Forward (Chicago)
Muchin College Prep (Chicago)
Waukegan High School

2017-2018 Leadership and Staff

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US Bank

Vice Chair

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BMO Private Bank

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UW-Milwaukee

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Power Formula LLC

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Brenda Campbell
SecureFutures

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*Crash Course Driver
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Andrea Cataldo
Godfrey & Kahn, S.C.

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Scale Up Milwaukee

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Provident Trust Co

Christine Smyth
US Bank

Nathan Stading
*BMO Global Asset
Management*

Peter Syslack
Wells Fargo Funds

Janet Tierney
Tierney Grey

Advisory Council

Wendy Baumann
WWBIC

Nicole Best
Heartland Advisors

Bert Bilsky
ANON Charitable Trust

Robert Bukowski
Alpha Investment Consulting Group

Andrew Burish
*The Burish Group
UBS Financial Services, Inc.*

Marina Carlson
Community member

Eric Christophersen
Northwestern Mutual Wealth

Lori Craig
PNC Wealth Management

Fred Croen
Retired Attorney

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Mortgage Guaranty Insurance Corp.

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UW Board of Regents

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WaterStone Bank

Dr. Eve Hall
Milwaukee Urban League

Nina Johnson
Associated Bank

Gerald Levy
Community member

David Mancl
Wisc. Dept. of Financial Institutions

John McDonald
Godfrey & Kahn, s.c.

Ann Milette
Wells Capital Management

William Nasgovitz
Heartland Advisors, Inc.

Keith Posley
Milwaukee Public Schools

William Priebe
Geneva Capital Management

Mark Sain
*Milwaukee School Board Director-
Office of Board Governance*

Michael Sattell
Jewish Home & Care Center

Joe Schlidt
Godfrey & Kahn, s.c.

Howard Schnoll
RBC Wealth Management

Mary Ellen Stanek
Robert W. Baird

Dan Tranchita
Robert W. Baird

Les Weil
Les Weil Consulting, LLC

Ray Wilson
PricewaterhouseCoopers LLP

Staff

Brenda Campbell
President and CEO
brenda@securefutures.org

Kristen Ruhl
Program Director
kristen@securefutures.org

Pat Rorabeck
Business Director
pat@securefutures.org

Annmarie Baumgartner
Development Director
annmarie@securefutures.org

Vicki Lipinski
Operations Director
vicki@securefutures.org

Kathy Weinberg-Kinsey
Volunteer Manager
kathy@securefutures.org

Stephaine Crosely
Program Manager - Money Coach
stephaine@securefutures.org

Chineva Smith
Program Manager - Money Coach
chineva@securefutures.org

Patrick Armstrong
Program Manager
patrick@securefutures.org

Emily Wilson
Development Manager
emily@securefutures.org

Therese Goode
Marketing and Communications Specialist
therese@securefutures.org

Felecia Fluker
Program Associate
felecia@securefutures.org

2017-2018 Financials

Assets

2017-2018

Cash	\$658,757
Pledges receivable	\$36,150
Fixed assets	\$79,781
<u>Less depreciation</u>	<u>\$60,145</u>
Total Assets	\$730,223

Liabilities and Net Assets

Accounts Payable	\$2,889
Accrued salaries and wages	\$19,782
Accrued expenses	\$15,445
Unrestricted net assets	\$609,817
<u>Temporarily restricted net assets</u>	<u>\$82,290</u>
Total Liabilities & Net Assets	\$730,223

Gross Revenue

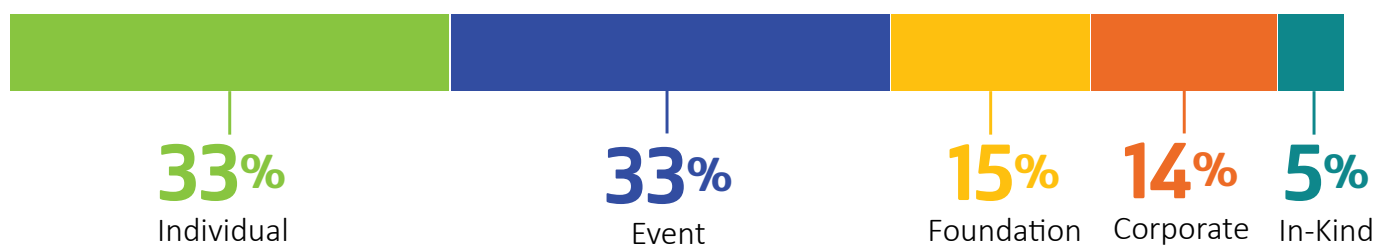
Corporate contributions	\$140,476
Foundation contributions	\$148,945
Individual donations	\$333,313
Special events	\$332,426
In-kind contributions	\$48,679
Interest income	\$947
Revenue	\$1,004,786

Expenses

Program Services	\$690,359
Administration	\$127,456
<u>Development</u>	<u>\$169,754</u>
Total Expenses	\$987,569

Change in Net Assets	\$17,217
<u>Net assets at Beginning of Year</u>	<u>\$647,890</u>
Net Assets at End of Year	\$692,107

Revenue Sources



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



710 N. Plankinton Ave., Suite 1400 Milwaukee, Wisconsin 53203
securefutures.org | (414) 273-8101

