



The Next Chapter in Financial Education

2023-2024 SecureFutures Annual Report



December 6, 2023, was a game-changing day in Wisconsin

It was the day Act 60 was signed into law. Starting with the class of 2028 - this year's freshmen - Wisconsin high school students will be required to take a semester-long personal finance class to graduate. So what does this mean for SecureFutures?

With this new mandate, SecureFutures can redirect resources previously devoted to the Money Sense program and allocate them toward expanding the Money Coach and Money

Path programs. This shift allows SecureFutures to take even more under-resourced teens to the next level of financial education. We will continue to provide Money Sense to private, charter, and parochial schools, which are not impacted by the state mandate. SecureFutures will also continue to provide resources and support to educators, especially those unfamiliar with personal finance topics, so they are prepared to connect with students and feel confident in delivering effective financial education.

With the passage of Act 60, SecureFutures became the 24th state in the nation to require a personal finance course to graduate, a number that has since risen to 26. We believe that in the next 5-10 years, we will see all 50 states with a personal finance requirement, bringing our vision of financially informed families one step closer to becoming a reality.

We are so grateful for the support of our educators, volunteers, donors, and corporate and foundation partners. The 2023-2024 Annual Report is a reflection of your commitment to our mission, and we can't thank you enough. Together we are giving Wisconsin teens the tools they need to transform their financial futures and watching as lasting change takes place across the nation. Here's to a future where every young person has the knowledge to make confident financial decisions, and where teen financial empowerment strengthens every community. Thank you for being an essential part of this journey.

Brenda Campbell
President and CEO

Jackie Darr
2023-2024 Chairperson of the Board of Directors

2023-2024 Program Impact

SecureFutures, founded in 2006, equips teens with money management skills, tools, and mentoring so they can achieve financial capability, strengthen their communities, and reach their goals. Because of YOU, SecureFutures is a leader in teen financial literacy with programs that have now impacted more than **126,000** teens! Thank you for your unwavering support!

14,308
students served

170
site partners

190
volunteers

For a full listing of our 2023-2024 partners, visit www.securefutures.org/2023-2024-partners/

Our Mission

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

Our Vision

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



Money Path

Our **cutting-edge, web-based financial education app** opens students' eyes to the reality of how the academic and career choices they make now will impact their lives and long-term financial wellbeing. Through a personalized, technology-based experience, students explore and compare different college and career paths, calculate education costs and reinforce personal finance concepts for increased confidence and readiness.

10,044
students

140
sites

164
educators

49
volunteers



94%
reported they are more likely to set up a savings plan for important financial goals



83%
reported they are more likely to determine what student loan amount is manageable



84%
reported increasing their knowledge of how income, spending, and saving are all connected

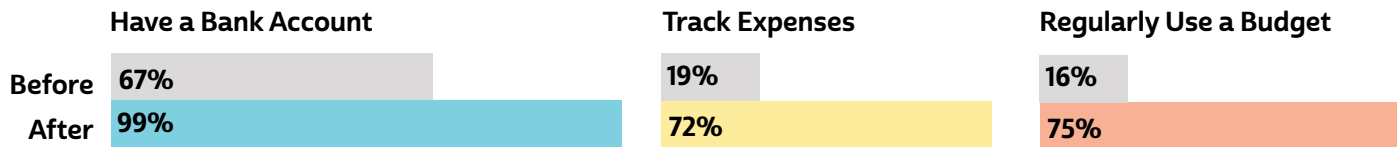
My mom really wants me to go to college, but she worries about where the money is going to come from. Money Path showed me how much we would have to pay for college and how scholarships can help reduce the cost. To have a resource like Money Path really helps.

- Kate, South Division High School

Money Coach

Money Coach, a **one-of-a-kind financial mentoring program**, provides teens from under-resourced communities with the coaching and guidance needed to develop strong money management habits and long-term financial capability.

Student financial habits before and after Money Coach:



405
students

20
sites

97
volunteers

My favorite thing about the Money Coach program is the people who came in and contributed their precious time to teach us to be better educated and responsible with our money. Everyone is super nice and very well-spoken. Thank you for everything!

- Hae Ku Thaw, Hamilton High School

Money Sense

The **financial fundamentals** program that introduces teens to essential financial literacy concepts and practices such as budgeting, opening and managing a bank account, credit cards and credit scores.

3,884
students

50
sites

72
volunteers



reported the information and skills taught are useful



reported the program will positively impact the way they handle money



reported they will share what they learned with others

I really enjoyed learning new things about money that I didn't know before. For example, how a credit card works, different ways to save money, and how it will help me in the future.

- Vang, Hmong American Peace Academy



Lloyd Levin Difference Maker Volunteers

Angela Stenklyft & Michael Thelen

Every year SecureFutures recognizes one individual volunteer and one partner organization for their contribution to our mission of teen financial empowerment. The

award is named to honor our founder, and this year the 2024 Lloyd Levin Difference Maker Volunteer award went to Angela Stenklyft and Michael Thelen, dedicated volunteers from Baird.

Angela and Michael have been partnering together in the classroom since 2016 to deliver all three of our programs to students. Together they have dedicated over 176 hours of volunteer time, positively impacting the lives of countless teens in our community.

Winning the Lloyd Levin Difference Maker award is a testament to Angela and Michael's dedication and hard work. As Michael reflects, *"Being recognized is truly an honor and reaffirms that we are making a difference."* Angela adds, *"It's special to know that our efforts are appreciated and that we're contributing to the community in a meaningful way. This recognition motivates us to continue our work and inspire others to join us in this important mission."*



Lloyd Levin Difference Maker Corporate Partner

Racine Community Foundation

The 2024 Lloyd Levin Difference Maker Organization award went to the Racine Community Foundation. The Foundation has long been a driving force behind initiatives that uplift Racine County, and their ongoing support of SecureFutures is no exception.

Liz Powell, President and CEO of the Racine Community Foundation, has been instrumental in guiding the Foundation's mission to meet the community's greatest needs. Since 2016, the Foundation has partnered with SecureFutures to provide critical financial education to teens, first through the Money Sense program and now with the recent expansion of Money Coach into Racine high schools.

One of the key areas the Racine Community Foundation prioritizes is breaking the cycle of generational poverty, which is why SecureFutures' mission resonates so strongly with them. As Liz states, *"We're looking at generations of young people growing up not knowing anything about financial literacy. The impact that financial education has on the family and on individuals is huge. We want to give our kids the tools they need to be successful as they enter adulthood."*

For a full listing of our 2023-2024 volunteers, visit www.securefutures.org/2023-2024-volunteers/

16th Annual Investment Conference

2024 SPEAKERS

Keynote Speaker

Ted Seides, Capital Allocators

Economic Overview Speaker

Michael Antonelli, Baird

Investment Idea Speakers

Jeff Hakala, Clarkston Capital
Chris Smith, Artisan Partners

Moderator

Joe Schlidt, Godfrey & Kahn

Our 16th annual SecureFutures Investment Conference held at the Baird Center was another incredible success. We had over 500 attendees and net revenue and appeal support of more than **\$680,000!**

Arlesia Benson, an alumnus of our Money Coach program, spoke about how joining the program was a turning point in her life, helping her understand critical financial fundamentals and sparking a passion to pursue a career in financial planning. The program had such an impact on Arlesia that she became a Money Coach volunteer herself. *“Having experienced the program firsthand, I am committed to paying it forward and investing the same time and energy into others that was once invested into me.”*

Our sincere appreciation goes out to U.S. Bank, who for the third consecutive year, was the Premier Sponsor of the conference. We’d also like to thank all sponsors, speakers, and attendees for your dedication and partnership. Your support fuels our mission of teen financial capability.

Mark your calendars for our 17th annual Investment Conference on May 13, 2025 at Baird Center’s new rooftop ballroom. For more information, visit www.securefuturesconference.com.

Teen Financial Capability Champion

Joe Schlidt, Director of Client Special Services at Godfrey & Kahn, S.C. received the third annual Teen Financial Capability Champion award at SecureFutures’ 16th Annual Investment Conference. The award recognizes those who have made an ongoing commitment to support SecureFutures programming.

Joe is the originator of the annual investment conference and with him continuing to lead the charge, the conference has grown every year, raising a total of over \$4 million and enabling us to serve thousands of teens.

As SecureFutures’ President and CEO Brenda Campbell states, *“Joe steps up over and over for SecureFutures and the kids we serve. There is no single individual who has impacted the mission and organization more than Joe Schlidt.”*





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For a full listing of our 2023-2024 donors, including Supporter Level, visit www.securefutures.org/2023-2024-donors/

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 Zilber Family Foundation

July 2023 - June 2024 Financials

ASSETS

Cash	\$892,608
Certificates of Deposit	\$807,172
Pledges and receivables	\$56,500
Prepaid expenses	\$19,535
Total fixed assets	\$1,871,460
Total intangible assets	\$290,598
Lease assets	\$275,922
Total assets	\$2,529,481

LIABILITIES AND NET ASSETS

Accounts payable	\$9,647
Accrued salaries and wages	\$70,041
Lease liabilities	\$355,801
Unrestricted net assets	\$2,037,492
Temporarily restricted net assets	\$56,500
Total liabilities & net assets	\$2,529,481

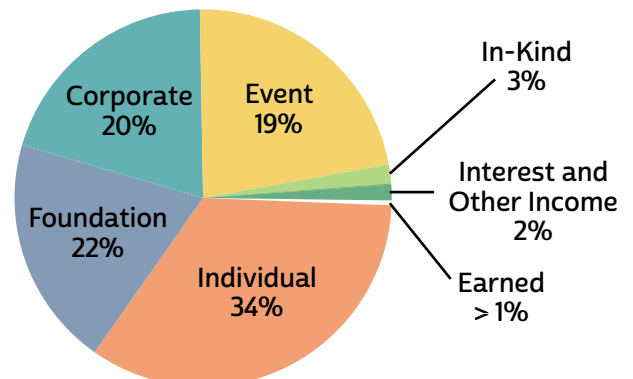
GROSS REVENUE

Corporate contributions	\$406,335
Foundation contributions	\$438,600
Individual donations	\$697,328
Special events	\$380,953
In-kind contribution	\$60,218
Earned revenue	\$40
Interest and other income	\$42,513
Revenue	\$2,025,987

EXPENSES

Program	\$1,523,703
Administration	\$187,436
Development	\$184,792
Total expenses	\$1,895,931
Change in net assets	
Net at beginning of year	\$1,963,936
Net assets at end of year	\$2,093,992

Revenue Sources





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