

2024

July 1, 2023 - June 30, 2024

Annual Report



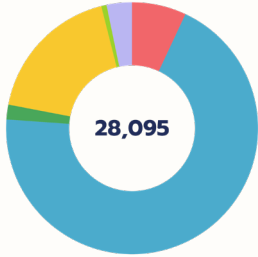
Our Programming Reach



TOTAL PARTICIPANTS SERVED

28,095

PROGRAM PARTICIPANTS SERVED



Foundations	19,426
SAFE	5,072
Footings	1,957
Pathways	534
Sr. Citizen Prog.	915
Forward	191

LMI LOCATIONS SERVED
65.5%

Total Number
of Classes

1,458

Special
Presentations

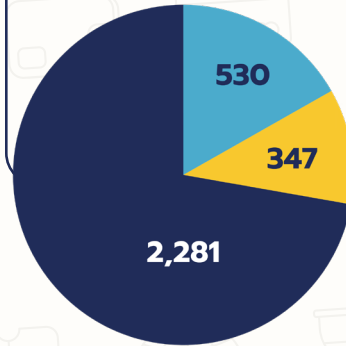
915

Total Learner
Hours

39,715

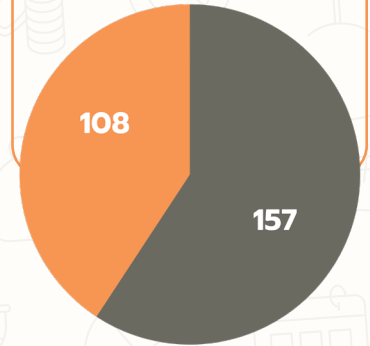
VOLUNTEER DATA

Trained Active Hours



PROGRAMMING PARTNERS

Community Partners School Partners



2024 BOARD MEMBERS

Bridget Banz Farmers New World Life Insurance	Joe Herrle, CFA, CAIA Ferguson Wellman Capital Management	Jeff Strickler Retired, Education Northwest
Jamess Beauford, MA JCarey Connects, LLC	Frewine Kiros The Center Consultancy	John Stirek (Sr.) Retired, Business Owner
Donald L. Bielen, MBA, CFP, CM&AA Perkins & Co	Amanda Lang, CFP, CTFA AITI Tiedemann Global	John Stirek (Jr.) Trammell Crow Company
Ken Calhoun Retired, Business Owner	Liza Lipson WhatsApp	Duncan Taylor, CBSM Washington Bankers Association
Sean Edwards Village Family Capital	Martha Mickelson Homestreet Bank	Amy Theuma First Interstate Bank
Holly Files LaunchPoint Group, LLC	Heidi Sexton Sound Community Bank	Logwone Warrior Mitz Eagle Strategies LLC
Mike Fisher Retired, Country Financial	Tom Soma Retired Non-Profit CEO	Marc Wright Retired, BECU

PERSONAL FINANCE CONFIDENCE

85% of Learners Agree:

My knowledge to make financial decisions increased as a result of this session.

74% of Learners Agree:

I can apply what I learned today to my future financial goals.

71% of Learners Agree:

The information from the session will be useful to me in making future financial decisions.

69% of Learners Agree:

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67% of Learners Agree:

I feel confident in my ability to seek information from reliable financial sources.

17% Improvement from Learner Pre to Post Surveys

THANK YOU TO OUR 2024 CORPORATE PARTNERS!

AMERIPRISE FINANCIAL	PNC BANK
BANK OF AMERICA	RIVERVIEW BANK
BANNER BANK	SEATTLE BANK
BECU	SHAREBUILDER 401(K)
CAPITAL ONE	SOUND COMMUNITY BANK
CENTRIS FEDERAL CREDIT UNION	THE STANDARD
CHARLES SCHWAB	THE STANDARD CHARITABLE FOUNDATION
EAST WEST BANK	U.S. BANK
FARMERS NEW WORLD LIFE INSURANCE CO.	UBT UNION BANK & TRUST
FIRST CITIZENS BANK	UMPQUA BANK
FIRST FED	UNION PACIFIC FOUNDATION
FIRST INTERSTATE BANK	UNITUS COMMUNITY CREDIT UNION
FIRST TECH FEDERAL CREDIT UNION	WASHINGTON BANKERS ASSOCIATION
KEYBANK	WASHINGTON FEDERAL FOUNDATION
KITSAP BANK	WASHINGTON TRUST BANK
PACIFIC PREMIER BANK	

PERSONAL FINANCE KNOWLEDGE

100% of Learners Know:

Declaring bankruptcy means all personal assets are forfeited and liquidated.

100% of Learners Know:

When an investor spreads their money among different assets, the risk of losing money decreases.

100% of Learners Know:

Liability insurance protects a person from loss from lawsuits.

89% of Learners Know:

Individuals with a poor credit history will usually pay higher interest rates.

85% of Learners Know:

A weekly paycheck is an example of earned income.

66% Improvement from Learner Pre to Post Surveys

Californians Reached By Our Programming



TOTAL PARTICIPANTS SERVED

4,248

Total Number
of Classes

157

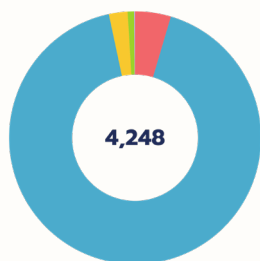
Special
Presentations

5

Total Learner
Hours

4,796

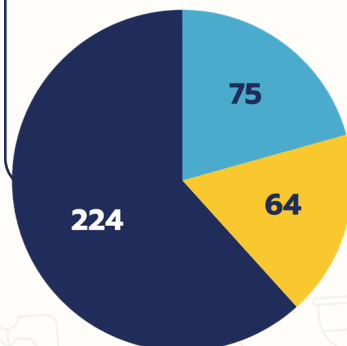
PROGRAM PARTICIPANTS SERVED



Foundations	3,911
Footings	195
SAFE	102
Forward	35
Sr. Citizen Prog.	5

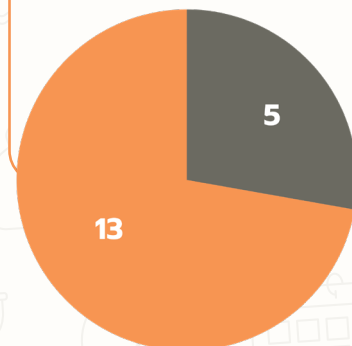
VOLUNTEER DATA

Trained Active Hours

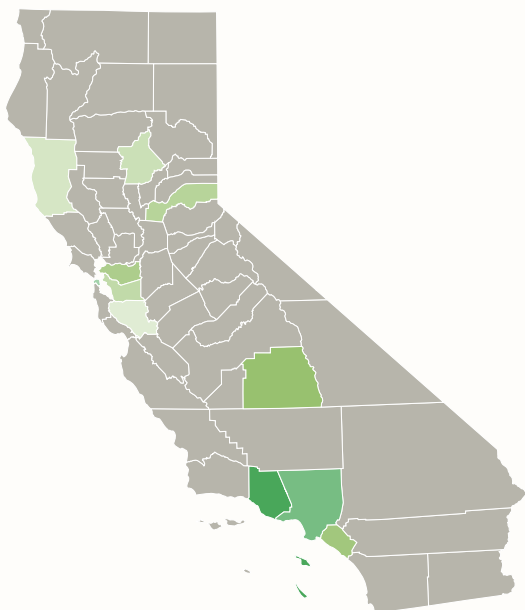


PROGRAMMING PARTNERS

Community Partners School Partners



PROGRAM PARTICIPANTS BY COUNTY



Ventura	2,106	Placer	122
Los Angeles	648	Alameda	45
San Francisco	427	Butte	40
Tulare	411	Mendocino	24
Orange	190	Santa Clara	20
Contra Costa	160		

LMI LOCATIONS SERVED

72.4%

PERSONAL FINANCE CONFIDENCE

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66% Improvement from Learner Pre to Post Surveys

Nebraskans Reached By Our Programming



TOTAL PARTICIPANTS SERVED

2,515

Total Number of Classes

86

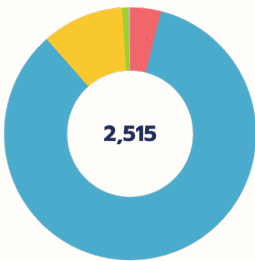
Special Presentations

5

Total Learner Hours

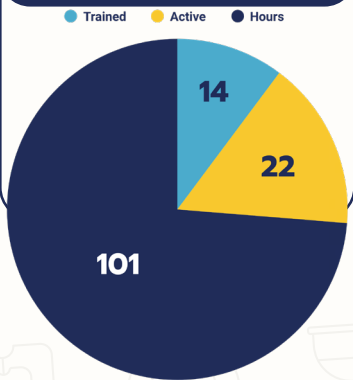
2,735

PROGRAM PARTICIPANTS SERVED

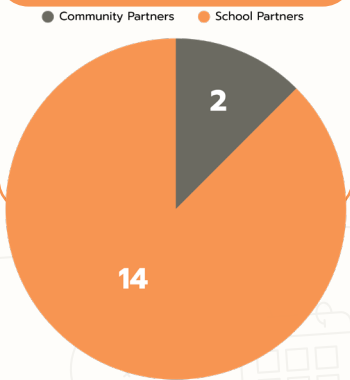


Foundations	2,125
SAFE	265
Footings	100
Forward	20
Sr. Citizen Prog.	5

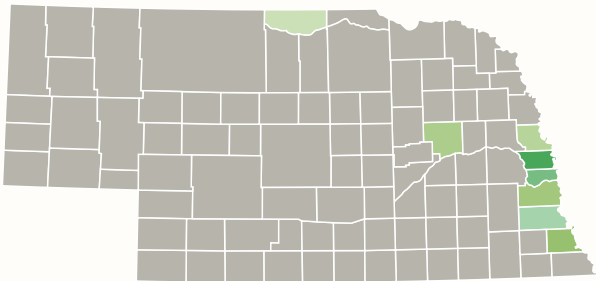
VOLUNTEER DATA



PROGRAMMING PARTNERS



PROGRAM PARTICIPANTS BY COUNTY



Douglas	2,183
Sarpy	80
Otoe	66
Nemaha	53
Cass	49
Platte	44
Washington	15

LMI LOCATIONS SERVED



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66% Improvement from Learner Pre to Post Surveys

Oregonians Reached By Our Programming



TOTAL PARTICIPANTS SERVED

13,387

Total Number of Classes

849

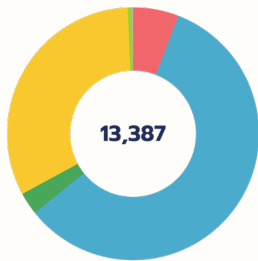
Special Presentations

14

Total Learner Hours

17,923

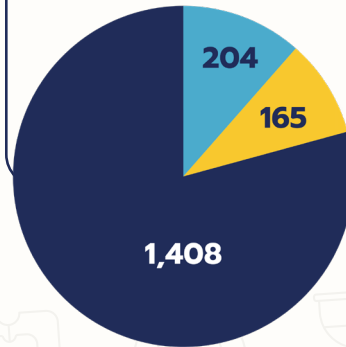
PROGRAM PARTICIPANTS SERVED



Foundations	7,813
SAFE	4,312
Footings	785
Pathways	384
Sr. Citizen Prog.	79
Forward	14

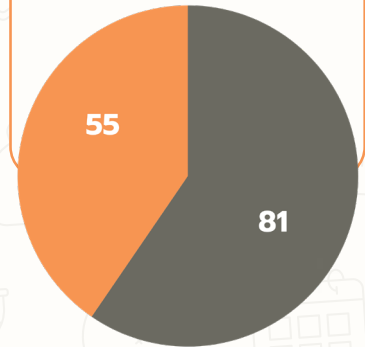
VOLUNTEER DATA

Trained Active Hours

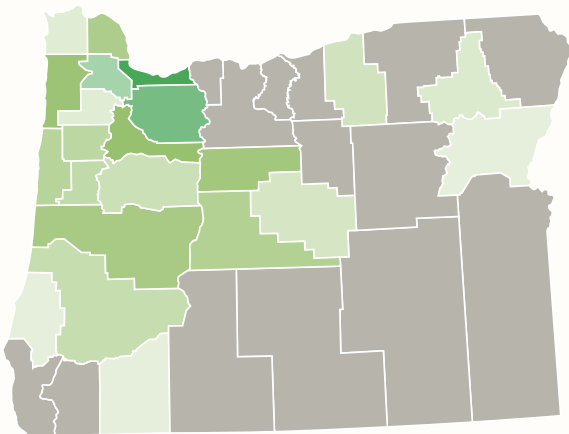


PROGRAMMING PARTNERS

Community Partners School Partners



PROGRAM PARTICIPANTS BY COUNTY



Multnomah	5,098	Benton	96
Clackamas	2,371	Douglas	55
Washington	2,077	Linn	54
Marion	1,210	Morrow	50
Tillamook	680	Crook	46
Jefferson	407	Union	30
Lane	404	Clatsop	24
Columbia	230	Jackson	24
Deschutes	205	Baker	16
Lincoln	165	Coos	4
Polk	127		

LMI LOCATIONS SERVED

58.8%

PERSONAL FINANCE CONFIDENCE

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Washingtonians Reached By Our Programming



TOTAL PARTICIPANTS SERVED

7,945

Total Number of Classes

366

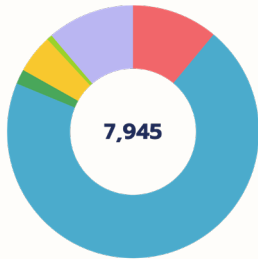
Special Presentations

891

Total Learner Hours

14,261

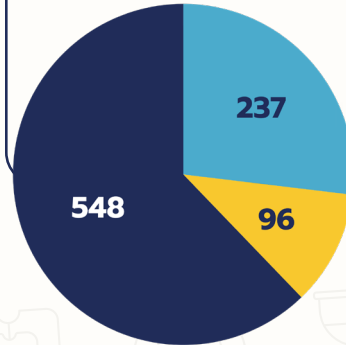
PROGRAM PARTICIPANTS SERVED



Foundations	5,577
Sr. Citizen Prog.	891
Footings	877
SAFE	393
Pathways	150
Forward	57

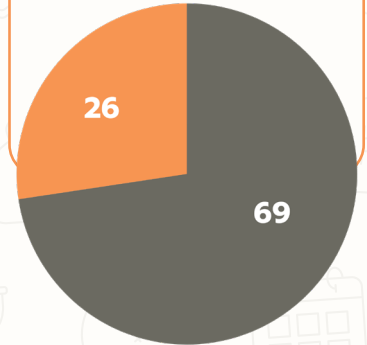
VOLUNTEER DATA

Trained Active Hours

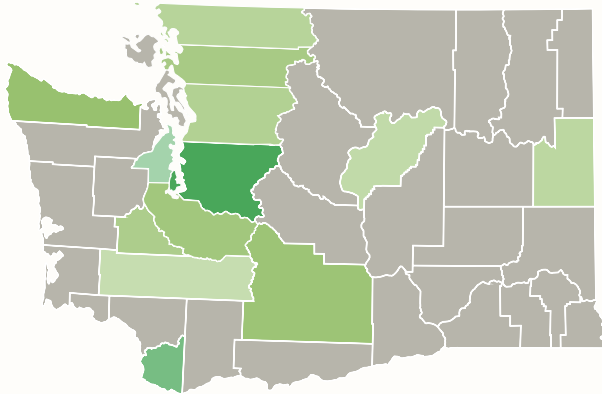


PROGRAMMING PARTNERS

Community Partners School Partners



PROGRAM PARTICIPANTS BY COUNTY



King	2,704	Thurston	260
Clark	877	Snohomish	257
Kitsap	753	Whatcom	250
Clallam	569	Spokane	237
Yakima	485	Douglas	65
Pierce	273	Lewis	58
Skagit	266		

LMI LOCATIONS SERVED

69.5%

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