



# Financial Matters

## 2019 Program Recap

A background image showing a teacher standing in a classroom, gesturing towards a whiteboard. The whiteboard has a presentation slide titled "Financial Literacy" with bullet points: "1. Identify your income and expenses", "2. Categorize your income and expenses", and "3. Total and compare the income and expense columns to create your spending plan". The teacher is wearing a black t-shirt with the text "OPRAH WASN'T BUILT A BACKLASH".

*Motivating students to make sound money management decisions & become financially savvy*

### Annual Program Impact



**12,798**  
students



**124**  
educators



**82**  
schools



**243**  
volunteers

"Students don't often know how to budget or manage their money; having a volunteer interact with them is so helpful. The students learn so much."

-Ashley Mace, College Possible Educator

### Program Results

- 92% of teachers stated that their students' financial literacy skills were improved
- 94% of teachers stated that students were given information and tools to help them make better educated financial decisions
- 92% of teachers agree that students feel more confident and prepared to manage their finances

*"I think financial literacy is one of the most important topics in our lifetime. I feel honored to be spreading this knowledge to our young individuals of today."*

-Yusra Mohamud, Wells Fargo



## About Financial Matters

Financial Matters equips students with the tools to develop sound money management skills.

Through interactive presentations, industry professionals help students become more financially literate. Available to teachers grades 6-12, the program offers a variety of topics that provide real-life lessons in money management.

## Special thanks to our Financial Matters Ambassadors Committees!

### Volunteer Engagement

Tammy Andrews, Citizens Independent Bank  
Chase Brakke, North Star Resource Group  
Yusra Mohamud, Wells Fargo  
Victor Thompson, Emergent Leadership Pathways  
Terry Weber, United Educators Credit Union  
David Wolfe, Educators Financial Services

### Content Creation

Chase Brakke, North Star Resource Group  
Stacey Conaway, Famous Dave's of America  
Bridget Peterson, SPIRE Credit Union  
Denise Phillips, Next Step Transition Program  
Andrea Thermos, Boulay

### Content Review

Mark Buchholtz, Allianz Life  
Mark Glasser, Allianz Life  
Jason Kley, Carlson Capital Management  
Cheryl Newell, Money \$marts LLC  
Molly Osberg, Maranatha Christian Academy  
Lori Stieber, Internal Revenue Service



## Program Highlights

- Financial Matters rolled out a brand new presentation to schools on Paying for College.
- In honor of Teach Your Children to Save Day, Financial Matters presentations impacted more than 600 students through the support of 26 Wells Fargo volunteers.
- Volunteers from Wings Financial Credit Union, Cedar Ridge Wealth Management Group, United Educators Credit Union, and Wells Fargo educated 2,000 eighth graders at the Minneapolis STEM expo.





*“Financial Matters offers life-changing opportunities for students. I highly recommend this amazing program and organization.”*

-John Morris, Colin Powell Leadership Academy Educator

## 2019 Schools Represented

Academy for Sciences & Agriculture High School, Vadnais Heights  
 Albany Senior High School  
 Anne Sullivan Communication Center, Minneapolis  
 Anoka High School  
 Apple Valley Senior High School  
 Blaine High School  
 Blooming Prairie High School  
 Bloomington Kennedy High School, Bloomington  
 Brooklyn Center Secondary School  
 Buffalo Community Middle School  
 Burnsville High School  
 Centennial High School, Circle Pines  
 Central High School, St. Paul  
 Central High School, Norwood Young America  
 Champlin Park High School  
 Chaska High School  
 Columbia Heights High School  
 Community of Peace Academy, St. Paul  
 Como Park Senior High School, St. Paul  
 Cookie Cart, Minneapolis  
 Coon Rapids High School  
 Delano Middle School  
 Eden Prairie Senior High School  
 Edison High School, Minneapolis  
 Eisenhower Elementary, Coon Rapids  
 Elk River High School  
 FAIR School Downtown, Minneapolis

Fernbrook Elementary School, Maple Grove  
 Fridley High School  
 General Colin L. Powell Leadership Academy, Minneapolis  
 Glenville-Emmons Secondary School  
 Harding Senior High School, St. Paul  
 Henry Sibley High School, West St. Paul  
 Highland Park Senior High School, St. Paul  
 Highview Alternative Program, Golden Valley  
 Holdingford High School  
 Humboldt High School, St. Paul  
 Irondale High School, New Brighton  
 Jefferson High School, Bloomington  
 Johnson High School, St. Paul  
 Maranatha Christian Academy, Brooklyn Park  
 Minnesota Transitions Charter School, Minneapolis  
 Minnetonka High School  
 MN Internship Center  
 Mound Westonka High School, Minnetrista  
 Mounds Park Academy, Maplewood  
 Mounds View High School, Arden Hills  
 MTS Secondary, Minneapolis  
 New Prague High School  
 New York Mills Secondary  
 Normandale Hills Elementary, Bloomington  
 North Senior High School, Minneapolis  
 North St. Paul High School  
 Northfield Senior High  
 Northside Christian, Blaine

Osseo Senior High School  
 Park Center IB World School, Brooklyn Park  
 Park High School, Cottage Grove  
 Pathways, Coon Rapids  
 Patrick Henry High School, Minneapolis  
 Prior Lake-Savage Area ALC  
 Project SUCCESS, Minneapolis  
 Red Wing High School  
 Richfield High School  
 Robbinsdale Armstrong High School, Plymouth  
 Robbinsdale Cooper High School, New Hope  
 Rogers High School  
 Roosevelt High School, Minneapolis  
 Secondary Technical Education Program, Anoka  
 Simley Senior High School, Inver Grove Heights  
 Southwest High School, Minneapolis  
 St Cloud Area Learning Center, Waite Park  
 St. Louis Park High School  
 St. Michael-Albertville High School  
 St. Paul Academy & Summit School  
 Tartan High School, Oakdale  
 The Next Step Transition Program, North St. Paul  
 Ubah Medical Academy, Hopkins  
 University of St. Thomas  
 Upward Bound - Century College, White Bear Lake  
 Washburn High School, Minneapolis  
 Washington Tech Secondary Magnet, St. Paul  
 Wilson Elementary, Anoka



*"Learning and practicing good personal finances is a life-long skill. Financial Matters provides students with the knowledge to be successful."*

-Debbie Huddleston, Xcel Energy



## 2019 Companies Represented

3M  
Accord Financial Strategies  
Account-Ability Plus  
ADP  
Affinity Plus Federal Credit Union  
AgriBank  
Allianz Life  
Allina Health  
Allstate  
American Family Insurance, Nick Atkinson Agency  
Ameriprise Financial  
Ameriprise National Trust Bank  
Anfinson Thompson & Co.  
Artisan Financial Group  
Associated Bank  
Better Business Bureau of MN/ND  
BMO Harris Bank  
Boulay PLLP  
Breitenfeldt Group  
Bremer Bank  
Bridgewater Bank  
Carlson Capital Management  
Carlson Wagonlit Travel  
Castle Rock Financial Planning, Inc.  
Cedar Ridge Wealth Management Group  
Charles Schwab  
Choice Bank  
Citizens Independent Bank  
City & County Credit Union  
CliftonLarsonAllen LLP  
Constellation Wealth Group  
Consumer Credit of Minnesota  
Cordis Financial  
Cymbet Corporation  
Dax V. Stoner, Ltd.  
Department of Defense  
Echo Wealth Management

Educators Financial Services  
Educators Financial Services, Inc.  
FamilyMeans/CCCS  
Famous Dave's of America Inc.  
Federated Insurance  
Fiduciary Counselling, Inc.  
Financial Empowerment LLC  
Financial LifeLab, Inc.  
First Bank & Trust  
Flagship Bank  
Focus Financial  
General Mills  
Great Waters Financial  
Hiway Federal Credit Union  
HomeTown Credit Union  
Image Sensing Systems, Inc.  
Integrity Wealth  
Internal Revenue Service  
Keller Williams Integrity Realty  
Keller Williams Realty, Inc.  
Landvik Financial  
Luther Westside Volkswagen  
Maranatha Christian Academy  
McNellis & Asato  
Merced Capital LP  
Minnesota Bank & Trust  
Minnwest Bank  
Money \$marts LLC  
Morgan Stanley  
National Western Life  
New York Life  
Next Steps 2 Success, LLC  
North Central University  
North Star Resource Group  
Old National Bank  
Otter Tail Power  
Pan, Inc.

PWB CPAs & Advisors  
PwC  
RBC Wealth Management  
Red Wing Shoe Company  
Reese, Winter, & Associates  
Riverland Community College  
SeQuel Response  
SPIRE Credit Union  
Spray Control Systems, Inc.  
TaTonka Real Estate Advisors  
Tempo Investment Advisors  
The Advocate Group  
The Minneapolis Foundation  
The Next Step Transition Program  
Thorsen, Breidinger, & Novak, P.A.  
Thrivent Financial  
Thrivent Financial-Stonebridge Group  
TopLine Federal Credit Union  
Toro Company  
TriNet  
Tschida Investments  
Twin Cities Wealth Strategies, Inc.  
U.S. Bank  
United Educators Credit Union  
UnitedHealth Group - Optum Campus  
University of Minnesota  
Vector Wealth Management  
Versique Search & Consulting  
Wakota Federal Credit Union  
Wealth Enhancement Group  
Weivoda Financial Ltd  
Wells Fargo  
Wings Financial Credit Union  
Woodbury Financial  
Xcel Energy

Thanks to our volunteers, sponsors, partners, and educators!

