



Financial Matters

2020 Program Recap

A photograph of three people, two women and one man, looking at a document together. The woman in the center is wearing a red shirt with "Volunteer" written on it. The man on the right is wearing a black shirt. The woman on the left is wearing a purple hoodie. They are standing in front of a blue backdrop.

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

Annual Program Impact



10,272
students



112
educators



77
schools



159
volunteers

"Financial Matters shapes productive, engaged, and innovative members of society. BestPrep provides sparks that change students' lives."

-Kristyn Martin, Jennings Experiential High School Educator

Program Results

- 99% of teachers stated that their students' financial literacy skills were improved.
- 97% of teachers stated that students were given information and tools to help them make better educated financial decisions.
- 96% of teachers agree that students feel more confident and prepared to manage their finances.

"When I was in school, I had a lot of stress around money topics. BestPrep allows students to be educated and learn critical items before they encounter them so they can go in with confidence!"

-Stacey Conaway, Winnebago Industries Volunteer



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. Due to the pandemic, BestPrep adjusted its programming to virtual in spring 2020. Rather than presenting in the classroom, volunteer speakers recorded presentations which were then assigned to students to view.

Special thanks to our Financial Matters Ambassadors!

Content Creation Committee: Buying a Car

Jason Bauerly, Ameriprise Financial, Chair
Mark Hayes
Amanda Kissner, Wakota Federal Credit Union
Valerie Young

Content Review Committee: Tax Matters

Cheryl Braman, Mounds View High School
Mark Hayes
Cheryl Newell, Money \$marts LLC
Andrea Thermos, Boulay, Chair
David Wolfe, Educators Financial Services
Valerie Young

Content Review Committee: Housing Matters

Chase Brakke, North Star Resource Group
Mark Buchholtz, Allianz Life, Chair
Eldina Hegic, Wells Fargo
Amanda Kissner, Wakota Federal Credit Union
Victor Thompson, Emergent Leadership Pathways



Program Highlights

- Volunteers from five organizations impacted 2,000+ eighth graders at the Minneapolis STEM Expo. Organizations included Wings Financial Credit Union, Cedar Ridge Wealth Management Group, United Educators Credit Union, and Wells Fargo.
- Financial Matters revised "Housing Matters" and "Tax Matters" and created a presentation for the "Buying a Car" topic.
- BestPrep created seven videos covering Financial Matters content to continue serving students during distance learning.



"It's wonderful to connect students and workplace professionals. It gives students real-life situations where they can apply what they are learning in class."

-Ann Barnes, Roseville Area High School Educator

2019-2020 Schools Represented

Apollo High School, St. Cloud
Big Lake Middle School
Blaine High School
Bloomington Kennedy High School
Bloomington Transition Center
Browerville High School
Buffalo High School
Burnsville High School
Byron Senior High School
Career & Life Transition Program, Roseville
Centennial High School, Circle Pines
Central High School, St. Paul
Champlin Park High School
Chanhassen High School
Chaska High School
Columbia Heights High School
Community of Peace Academy, St. Paul
Como Park Senior High School, St. Paul
Compass - Teen Pregnancy Program, Anoka
Coon Rapids High School
Delano Intermediate School
Eastview High School, Apple Valley
Edina Senior High
Fairview Alternative High School, Roseville
Forest Hills Elementary, Eden Prairie
Fridley Transition Program
Glenville-Emmons Secondary

Gordon Parks High School, St. Paul
Harding Senior High School, St. Paul
Heritage Academy of Science & Technology, Minneapolis
Highland Park Senior High School, St. Paul
Hopkins High School, Minnetonka
Humboldt High School, St. Paul
Integrated Arts Academy, Chaska
Irondale High School, New Brighton
Jefferson High School, Bloomington
Jennings Experiential High School, St. Paul
Johnson High School, St. Paul
Kennedy Secondary School, Fergus Falls
Leaders of Tomorrow, Minneapolis
Mankato West High School
Maranatha Christian Academy, Brooklyn Park
McKinley Area Learning Center, Waite Park
Metropolitan State University, St. Paul
Minnetonka High School
Minnewashta Elementary School, Excelsior
Mound Westonka High School, Minnetrista
Murray County Central High School, Slayton
Nicollet Senior High School
Normandale Hills Elementary, Bloomington
North Senior High School, Minneapolis
North St. Paul High School, North St. Paul
Northfield Area Learning Center
Northside Christian School, Blaine

Orono High School, Long Lake
Osseo Senior High School
Oxbow Creek Elementary School, Champlin
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
Richfield High School, Richfield
Robbinsdale Armstrong High School, Plymouth
Robbinsdale Cooper High School, New Hope
Rogers High School
Roosevelt High School, Minneapolis
Roseville Area High School
Secondary Technical Education Program, Anoka
Simley Senior High School, Inver Grove Heights
South St. Paul High School
Spring Lake Park Public Schools
Stillwater Area High School, Oak Park Heights
Tech High School, St. Cloud
The Next Step Transition Program, North St. Paul
Transition Plus, St. Louis Park
TriDistrict Community Education, West St. Paul
Washburn High School, Minneapolis
Washington Tech Secondary Magnet, St. Paul
Woodbury High School

2019-2020 Companies Represented

3M
401k Plan Professionals
A.J. Siddiqui CPA
Accenture
Accord Financial Strategies
Accredited Investors Wealth Management
Affinity Plus Federal Credit Union
Allianz Life
Allina Health
Allstate Insurance Company
Ameriprise Financial
Ameriprise National Trust Bank
Baird
BestPrep
Better Business Bureau of MN/ND
BMO Harris Bank
Boulay PLLP
Bremer Bank
Carlson Capital Management
Cedar Ridge Wealth Management Group
Charles Schwab
Choice Bank
CHS Inc.
City & County Credit Union
CliftonLarsonAllen LLP
Consumer Credit of Minnesota
Deloitte
Educators Financial Services
Edward Jones
EFS Advisors Mankato
EmilyMeans/CCCS
Federated Insurance

Fidelity Investments
Fiduciary Counselling, Inc.
Financial Empowerment LLC
First Bank & Trust
First Western Bank & Trust
Hiway Federal Credit Union
Image Sensing Systems, Inc.
Internal Revenue Service
Investors Choice Financial Services Inc.
JRA Financial Services
Keller Williams Integrity Realty
Keller Williams Realty, Inc.
Mahoney, Ulbrich, Christiansen & Russ, P.A.
McNellis & Asato
Medtronic
Minneapolis Wealth Advisors
Minnesota Bank & Trust
Minnesota Bankers Association
Minnwest Bank
Money \$marts LLC
Morgan Stanley
National Western Life
Next Steps 2 Success, LLC
North Central University
North Star Resource Group
Northpoint Commercial Finance
NorthRock Partners
Old National Bank
OptumHealth
Premier, Inc.
RBC Wealth Management
Riverland Community College

Royal Credit Union
RSM US LLP
Sawmill Private Management Inc.
SpartanNash
SPIRE Credit Union
SPS Commerce
St. John's University
Sterling Retirement Resources, Inc.
Sunrise Banks
TaTonga Real Estate Advisors
The College Place
The Upward Ladder
Thrivent
Thrivent -Stonebridge Group
TopLine Federal Credit Union
Twin Cities Wealth Strategies, Inc.
U.S. Bancorp
U.S. Bank
United Educators Credit Union
Wakota Federal Credit Union
WCRA
Wealth Enhancement Group
Wealth Management Midwest
Wells Fargo
Wells Fargo Advisors
Wells Fargo Audit Services
Wings Financial Credit Union
Winnebago Industries, Inc.
Xcel Energy