

Financial Matters

2018 Program Recap

Powered by bestprep

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

ANNUAL PROGRAM IMPACT



13,481
students



156
teachers



89
schools



259
volunteers



1,970
volunteer hours



“The Financial Matters program provides information that is absolutely vital for students to succeed as they head out to post-secondary education and the workplace.”

-David Lawson, Bridges Area
Learning Center Teacher

PROGRAM RESULTS

- **97%** 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 become more financially capable.
- **97%** of teachers agree that students developed sound money management skills.

Financial Matters

Financial Matters equips students with the tools necessary 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.



Roseville High School College Possible students learn how to create a budget during their Budgeting Matters presentation.

PROGRAM HIGHLIGHTS

- More than 90 volunteers delivered presentations to 2,000+ students at Patrick Henry and Robbinsdale Cooper High Schools.
- Volunteers from six organizations impacted 2,400 eighth graders at the Minneapolis STEM Expo. Organizations represented included FamilyMeans, Financial Planning Association of MN, Minnesota Bankers Association, United Educators Credit Union, Wells Fargo, and Wings Financial Credit Union.
- In honor of Teach Your Children to Save Day, Financial Matters presentations impacted 600+ students through the support of 11 Wells Fargo volunteers.

Financial Matters Volunteer Companies

Thank you to the many volunteers who have donated their time this year to positively impact the financial future of Minnesota students! BestPrep is truly grateful for your time

3M	Bridgewater Bank
A.J. Siddiqui CPA	Buck Financial Advisors, LLC.
Accessible Space, Inc.	BWK Rogers PC
Accord Financial Strategies	Cahill Financial Advisors
Acorn Financial Corporation	Capella University
AdvisorNet Financial	Carlson School of Management
Affinity Plus Federal Credit Union	CBIZ MHM, LLC
Allianz Life	Cedar Ridge Wealth Management Group
Allina Health	Channel Financial
Allstate	Charles Schwab
Ameriprise Financial	Charterpoint Wealth Strategies
Artisan Financial Group	Christofferson & Gleason CPAs LLC
Associated Bank	Citizens Independent Bank
Associated Benefits & Risk Consulting	CLA
BANKWEST	Coldwell Banker Burnet
BDO	Consumer Credit of Minnesota
BMO Harris Bank	Cymbet Corporation
Boulay PLLP	Deloitte
Bremer Bank	Department of Defense
	Department of Military Affairs

“The phrase I hear most from youth is ‘Why is this not taught in school?’ I explain that through programs like BestPrep, ‘It is!’ ”

-Sharon Reichenbach, People’s Bank of Commerce Volunteer



Seniors at Patrick Henry High School hear about spending vs. saving from volunteer, Alan Gunderson.

Financial Matters Volunteer Companies

“Having a professional from the field [in class] is effective in sharing the information included in our curriculum, and it can be much more current.

These are the real-life skills the kids need!”

-Laurie Oswalt, Blaine High School Teacher

Educators Financial Services, Inc.

Edward Jones

Emerson

FamilyMeans/CCCS

Federated Insurance

Financial Empowerment LLC

Financial LifeLab, Inc.

Flagship Bank

Focus Financial

Forum Communications Company

General Mills

Harding Senior High School

Harmon & Hartmon

Havenbrook Homes

Hiway Federal Credit Union

Hollstadt Consulting

HomeTown Credit Union

Internal Revenue Service

Investors Choice Financial Services Inc.

Investors Real Estate Trust

JEM Technical



Robbinsdale Cooper High School students work through a Money Matters activity.

JRA Financial Services

Keller Williams Realty, Inc.

KPMG

Kraus-Anderson Construction Company

Landvik Financial

Luther Westside Volkswagen

Maranatha Christian Academy

McNellis & Asato

Medtronic

Merrill Lynch

Midcontinent Media

MidWestOne Bank

Mindful Asset Planning

Minneapolis Business College

Minnesota Bankers Association

Minnesota Department of Commerce

Minnwest Bank

Money \$marts LLC

Morgan Stanley

Next Steps 2 Success, LLC

North Central University



Students gain a better understanding of Income Taxes and why they matter.

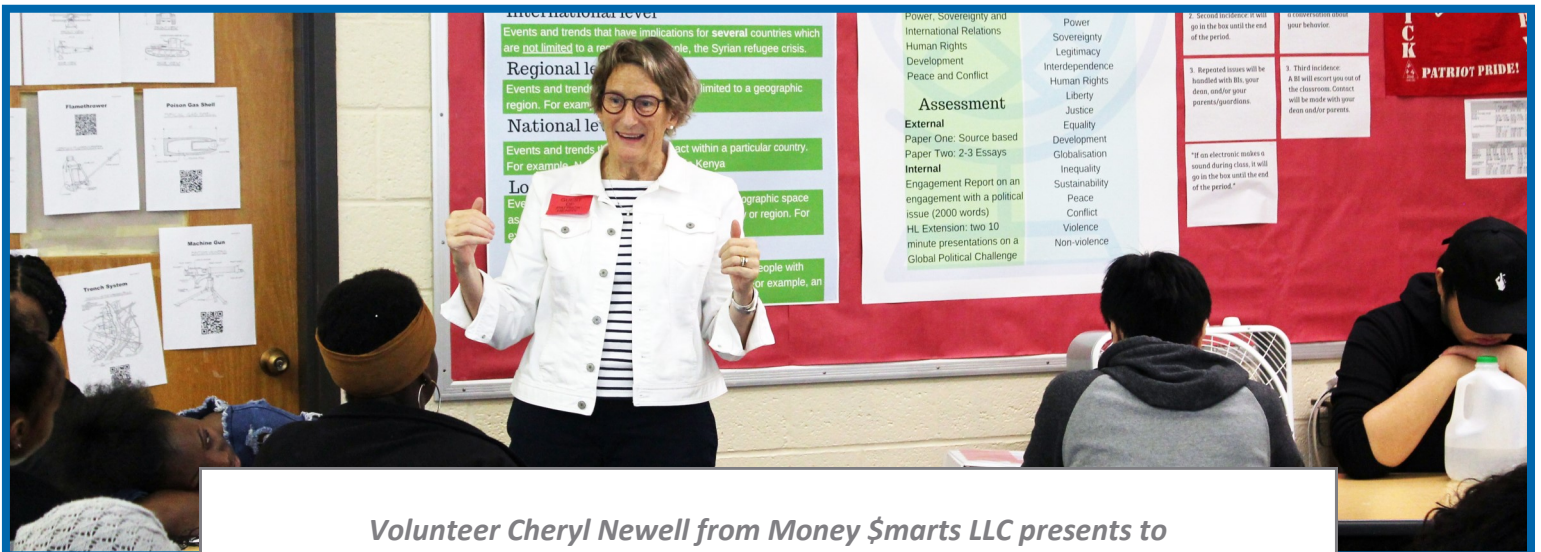
Financial Matters Volunteer Companies

North Star Resource Group
NorthRock Partners
Norwest Mezzanine Partners
Old National Bank
OptumHealth
Parametric Clifton
Peoples Bank of Commerce
RBC Wealth Management
Robbinsdale Cooper Senior High
Royal Credit Union
RSM US LLP
SeQuel Response
Smith Schafer
SNI Financial
SPIRE Credit Union
Spray Control Systems, Inc.
Stone Arch Organization Development
Student Paths
TaTonka Real Estate Advisors
Tempo Investment Advisors
The Advocate Group
The College Place
The Minneapolis Foundation
The Planning Center, Inc.
The Upward Ladder
Thorsen, Breidinger, & Novak, P.A.
Thrivent Financial

AMBASSADORS COMMITTEE

The Financial Matters Ambassadors Committee members are passionate volunteers who support the program's growth by creating new and updating current presentations, planning volunteer events, and giving feedback on the program. In addition, Ambassadors offer training by allowing new volunteers to shadow them in classrooms.

This past year, committees created presentation materials for a new presentation on Paying for College, updated Credit Matters, and hosted two volunteer engagement events.



Volunteer Cheryl Newell from Money \$marts LLC presents to students at Patrick Henry High School.

Financial Matters Volunteer Companies

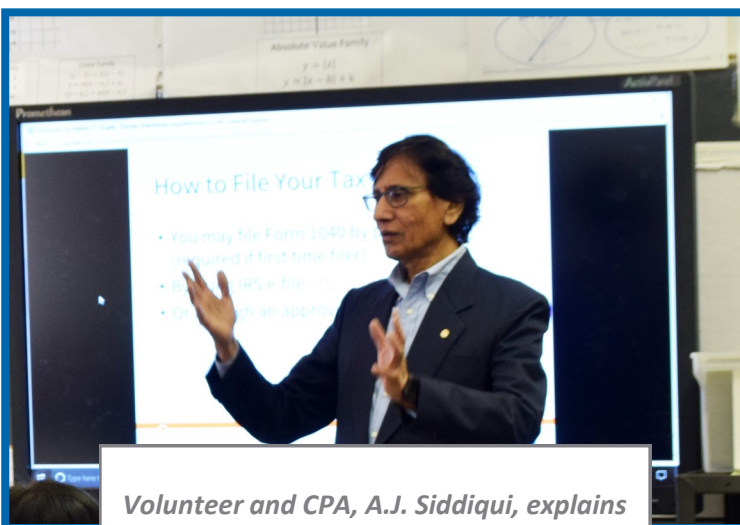


Volunteer John Comer from McNellis & Asato speaks to 9th graders about budgeting their money.

“Financial Matters is valuable to the students, not just for the materials and education provided, but also to interact with members of the community beyond their teachers and parents. Many of the students felt like they learned things they had not heard before.”

**-Bruce Wagner,
Financial LifeLab, Inc. Volunteer**

TopLine Federal Credit Union
Twin Cities Wealth Strategies, Inc.
U.S. Bank
United Educators Credit Union
UnitedHealth Group
UnitedHealthcare
University of Minnesota
USI Insurance
Varde Partners, Inc
Vector Wealth Management
Versique Search & Consulting
Voya Financial
Wakota Federal Credit Union
Waterstone Mortgage Corporation
Wealth Enhancement Group
Wealth Management Midwest
Webskowski Financial Network
Weivoda Financial Ltd
Wells Fargo
Wings Financial Credit Union
Wipaire, Inc.
Wipfli, LLP
Wixon Advisors
Xcel Energy



Volunteer and CPA, A.J. Siddiqui, explains income tax to 12th graders.

Financial Matters Schools

Thank you to the educators from these schools who chose to use BestPrep's Financial Matters program to enhance the education of their students and prepare them with sound money management skills!

AFSA High School, Vadnais Heights
American Indian Magnet School, St. Paul
Anne Sullivan Communication Center, Minneapolis
Battle Creek Middle School, St. Paul
Big Brothers Big Sisters, St. Paul
Blaine High School, Blaine
Blooming Prairie High School, Blooming Prairie
Bloomington Kennedy High School, Bloomington
Brooklyn Center Secondary, Brooklyn Center
Buffalo High School, Buffalo
Burnsville High School, Burnsville
Capitol Hill Gifted and Talented Magnet School, St Paul
Career & Life Transition Program, Roseville
Centennial High School, Circle Pines
Central High School, Norwood Young America
Century Community College, White Bear Lake
Champlin Park High School, Champlin
Chanhassen High School, Chanhassen
Columbia Heights High School, Columbia Heights
Community of Peace Academy, St. Paul
Como Park Senior High School, St. Paul
Cookie Cart, Minneapolis

Coon Rapids High School, Coon Rapids
Dakota Ridge School, Apple Valley
East Central Regional Juvenile Detention Center, Lino Lakes
Eden Prairie Senior High, Eden Prairie
Edina Senior High, Edina
Edison High School, Minneapolis
Elk River High School, Elk River
Fairview Alternative High School, Roseville
Falcon Ridge Middle, Apple Valley
Farnsworth Aerospace Upper Campus, St. Paul
Forest Lake High School, Forest Lake
Fridley High School, Fridley
Glenville-Emmons Secondary, Glenville
Harding Senior High School, St. Paul
Heights Community School, St. Paul
Henry Sibley High School, West St. Paul
Highland Park Senior High School, St. Paul
Hopkins High School, Minnetonka
Humboldt High School, St. Paul
Integrated Arts Academy, Chaska
International School of Minnesota, Eden Prairie



A volunteer from Flagship Bank shares a financial literacy lesson with Robbinsdale Cooper students.

Financial Matters Schools

“This program provides a great way for students to start thinking about their future and to start planning how they want to make their goals a reality.”







-Cassandra Karp, Linwood Arts Plus Lower Teacher

Irondale High School, New Brighton
Jefferson High School, Bloomington
Johnson High School, St. Paul
Lakeville South High School, Lakeville
Linwood Monroe Arts Plus Lower, St. Paul
Little Mountain Elementary, Monticello
Mankato West High School, Mankato
Maranatha Christian Academy, Brooklyn Park
Marcy Open Elementary School, Minneapolis
Moorhead High School, Moorhead
Mound Westonka High School, Minnetrista
Mounds Park Academy, Maplewood
Mounds View High School, Arden Hills
Murray County Central High School, Slayton
Murray Middle School, St. Paul
North Senior High School, St. Paul
North St. Paul High School, North St. Paul
Northfield Senior High, Northfield
Osseo Area Learning Center, Brooklyn Park
Park Center IB World School, Brooklyn Park
Patrick Henry High School, Minneapolis
Pioneer Elementary, Pierz
Prior Lake-Savage Area ALC, Prior Lake
Ramsey Middle School, St. Paul
Richfield High School, Richfield
Robbinsdale Armstrong High School, Plymouth
Robbinsdale Cooper Senior High, New Hope
Rockford High School, Rockford
Rogers High School, Rogers
Roosevelt High School, Minneapolis
Roseville Area High School, Roseville
Simley Senior High, Inver Grove Heights
South High School, Minneapolis

Southwest High School, Minneapolis
St. Louis Park High School, St. Louis Park
STAR Transition Program, Chaska
Stillwater Area High School, Stillwater
Tartan High School, Oakdale
The Next Step Transition Program, North St. Paul
Ubah Medical Academy, Hopkins
University of Minnesota Twin Cities, St. Paul
Washington Tech Secondary Magnet, St. Paul
West Education Center Alternative, Minnetonka
Wheels Driving Academy, Zimmerman
Woodland Hills Academy, Duluth



Volunteer Jeanna Fifer educates students about financial planning at the Minneapolis STEM Expo.

 JULIE ANDERSON, PROGRAM MANAGER  [TWITTER.COM/BESTPREPMN](https://twitter.com/BESTPREPMN)
 JANDERSON@BESTPREP.ORG  WWW.BESTPREP.ORG
 763-233-6332  [FACEBOOK.COM/BESTPREP](https://facebook.com/BESTPREP)