

2021

ANNUAL REPORT



HIGHLIGHTS

We drastically improved our work in reaching low-income communities, increasing their representation in overall class participation by 99%.

We successfully launched our Financial Empowerment Fellowship, recruiting 6 young adults from historically underrepresented communities in the Portland Metro Area to serve as leaders in their own communities.

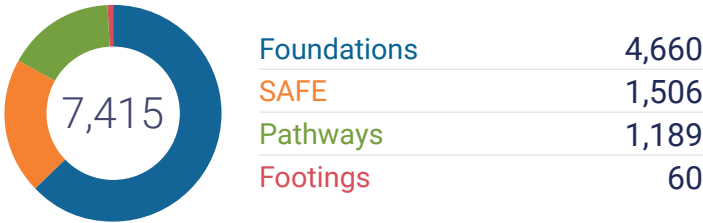
We hosted an expert webinar panel entirely in Spanish on COVID-19 financial resources. With panelists from Point West Credit Union, The Consulate of Mexico, and the Department of Consumer and Business Services, we reached more than 1,187 Oregonians via Zoom and Facebook Live! We were thrilled to provide the Spanish-speaking community with timely COVID-19 resources.

Oregonians Reached By Our Financial Education

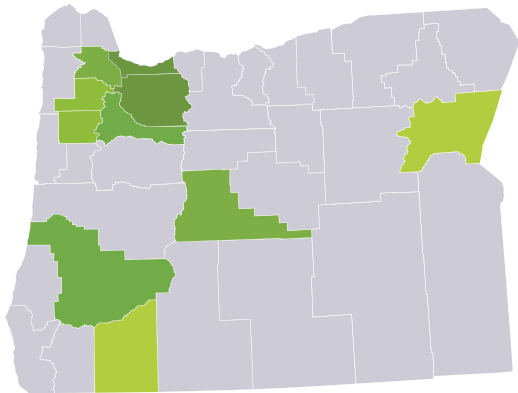
TOTAL SERVED

8,699

Virtual Class Participants

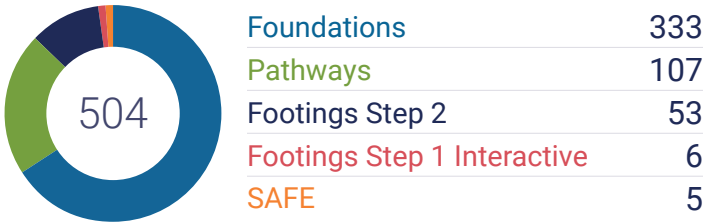


Program Participants by County



Multnomah	3,606	Deschutes	140
Clackamas	1,881	Yamhill	90
Marion	989	Polk	52
Douglas	705	Jackson	30
Washington	633	Baker	10

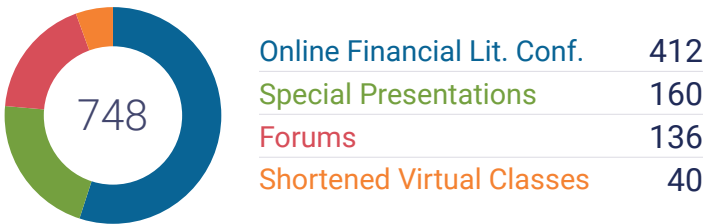
On-Demand Video Participants



In-Person Program Participants



Additional Participants



Programming Partners



Volunteer Engagement



# of New Volunteers Trained	207
# of Active Volunteers	59
Average Hours Per Volunteer	7.4

QUOTES FROM PARTNERS

“We appreciate everything that Financial Beginnings Oregon does for Canby High School. Our financial literacy unit is one of the most useful topics that we cover for high schoolers! I have tons of students who contact me as adults thanking me for helping them learn about their financial future.”

- Tonya Boustead, Teacher, Canby High School

“The Fellowship had a huge positive impact on both my professional and personal development, and the support I received from everyone made me feel like I was an important part of the team. I learned the importance of teamwork, adaptability, and goal setting. I am very grateful for the opportunity of being a part of Financial Beginnings and I will forever remember my time there, the people I met, and the things that I learned.”

- Javier Gomez, Financial Empowerment Fellow

Financial Education Impact

Banking

“I know how to choose a bank or credit union that benefits me.”



Budgeting

“I know how to keep my budget relevant when my financial circumstances change.”



Credit

“I know how to access and read my credit report.”



Investing

“I know my options for retirement savings.”



Risk Management

“I know how to compare various insurance coverage and costs to choose the right plan for me.”



Financial Report

TOTAL INCOME
698,081

TOTAL EXPENSES
621,199



Foundation Grants \$472,800	Corporate Donations \$117,170	Government Support \$38,000
Individual Donations \$29,383	Events \$26,051	In-Kind Donations \$14,677

Funding Partnerships

\$50,000+

Bank of America
OnPoint Community Credit Union
Wells Fargo

\$30,000+

Maybelle Clark Macdonald Fund
Spirit Mountain Community Fund
The Larry and Jeanette Epping Family Foundation

\$20,000+

Herbert A. Templeton Foundation
Oregon College Savings Plan
Richard B. Siegel Foundation
The Collins Foundation

\$10,000+

Better Way Foundation
Capital One
Columbia Bank

Don & Julie Rugg
First Tech Federal Credit Union
Harvest Foundation
James & Shirley Rippey Family Foundation

Joseph E. Weston Public Foundation

Oregon Department of Consumer and Business Service

Pacific Premier Bank
Rivermark Community Credit Union

The Standard
Union Pacific Foundation
Unitus Community Credit Union
U.S. Bank

\$5,000+

Ameriprise Financial Services, Inc., Portland, OR
Autzen Foundation
Banner Bank

City of Hillsboro
Heritage Bank
JPMorgan Chase & Co.
Multnomah Group
Nelson S. Talbott Foundation
Northwest Credit Union Foundation
Riverview Community Bank
Swigert Foundation

\$2,500+

Amy Theuma
Douglas Lilley
FP Transitions
H.W. and D.C.H. Irwin Foundation
Oregon Bankers Association Education Foundation
Point West Credit Union
Umpqua Bank
Washington Federal

\$1,000+

First Citizens Bank
Ford Family Foundation
Frederick Kinyon
Jackson Foundation
Joshua Brakel
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McDonald Jacobs, PC
Oregon Jewish Community Youth Foundation
Pacific Power Foundation
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Two Rivers Mortgage
Weyerhaeuser Community Giving Fund

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