

2022

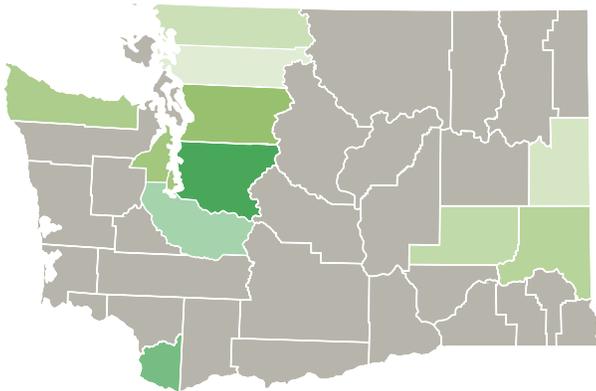


Annual Report



Washingtonians Reached By Our Programming

PROGRAM PARTICIPANTS BY COUNTY



● King	3,400	● Whitman	101
● Clark	2,314	● Adams	37
● Pierce	1,944	● Whatcom	20
● Snohomish	664	● Spokane	15
● Kitsap	556	● Skagit	5
● Clallam	195		

63%

LMI Participants

TOTAL PARTICIPANTS SERVED

9,491

Total Number
of Classes

439

Special
Presentations

240

Total Learner
Hours

11,689

PROGRAM PARTICIPANTS SERVED



9,251

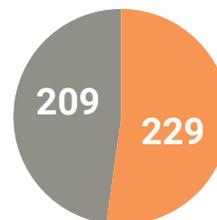
Foundations	8,369
Footings	412
Pathways	150
Framings	275
SAFE	38
Forward	7

VOLUNTEER DATA



New Volunteers Trained	197
Active Volunteers	108
Volunteer Hours	1,381

PROGRAMMING PARTNERS



209

229

K-12 & Postsecondary
Community Partners

QUOTES FROM PARTNERS

"I couldn't ask for a better partnership."

- Volunteer Presenter from Columbia Bank

"The enthusiasm and connections to kids is awesome. Thank you so much; what you've taught the students has been priceless."

- Middle School Teacher in Tacoma

Financial Education Impact

Our Financial Foundations program is assessed via learner surveys measuring personal finance knowledge and confidence gained from participation. This knowledge and confidence is vital to establishing the components needed for future financial well-being.

Our Impact for 2022

PERSONAL FINANCE KNOWLEDGE

Percentage of learners that know the key factors to consider when selecting a financial advisor	92%
Percentage of learners who can correctly identify an example of earned income	87%
Percentage of learners who can correctly identify an example of a person's fixed expense	84%
Percentage of learners who know that a poor credit history results in a higher interest rate	82%

PERSONAL FINANCE CONFIDENCE

"The information from this session will be useful to me in making future financial decisions."	Agree 88%	Neutral 8%	Disagree 4%
"I can apply what I learned today to my future financial goals."	Agree 86%	Neutral 11%	Disagree 3%
"My knowledge to make financial decisions increased as a result of this session."	Agree 80%	Neutral 15%	Disagree 5%
"I feel more confident in my ability to make good financial decisions after this session."	Agree 77%	Neutral 19%	Disagree 4%
"I feel more confident in my ability to seek information from reliable financial sources after this session."	Agree 77%	Neutral 19%	Disagree 4%

Equity Statement

We recognize a greater need to serve minoritized and marginalized populations stems from a long-rooted history of systemic oppression, which has excluded these populations from having equitable access to financial knowledge and sound resources.



Funding Partnerships

\$50,000+

Firsttenberg Foundation

\$30,000+

BECU
Don and Julie Rugg

\$20,000+

Bank of America
Darcy Johnson
Marie Lamfrom Foundation

\$10,000+

Columbia Bank
First Tech Federal Credit Union
Harvest Foundation
Medina Foundation
The Norcliffe Foundation
Pacific Premier Bank
Russell Investments
ShareBuilder 401K
Sound Community Bank
State Farm

\$5,000+

Catherin Holmes Wilkens Charitable Foundation
Cathay Bank
The Gates Foundation/Marc Lloyd
Heritage Bank
JP Morgan Chase

\$2,500+

Damon Benedict and Teresa Pineda
Dorsey and Whitney Trust Company
Fulcrum Capital
Umpqua Bank
WA Banker's Association

\$1,000+

Amanda Lang
John Dozier
Heidi Sexton
Marc Wright

THANK YOU DONORS
AND SPONSORS!

Financial Report

TOTAL EXPENSES

374,265

TOTAL INCOME

420,972



Foundation Grants

\$210,200

Corporate Donations

\$109,000

Individual Donations

\$62,050

Government Support

\$39,722

Board of Directors

AMANDA LANG - Secretary, Tiedemann Advisors
JAY O'NEAL - Republic Services
HEIDI SEXTON - Chair, Sound Community Bank
DUNCAN TAYLOR - Treasurer, Washington Bankers Assoc.
MARC WRIGHT - BECU



WASHINGTON

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