

2023

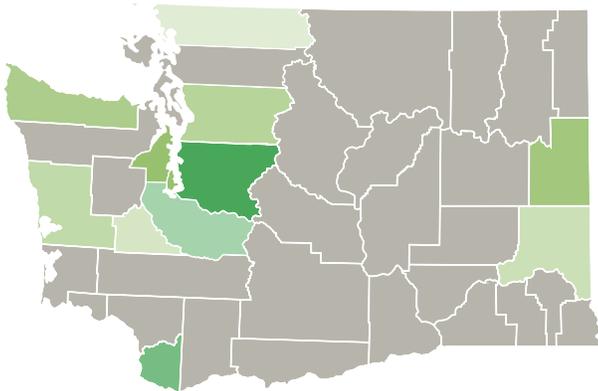


# Annual Report



# Washingtonians Reached By Our Programming

## PROGRAM PARTICIPANTS BY COUNTY



● King	3,221	● Snohomish	223
● Clark	1,355	● Grays Harbor	200
● Pierce	1,059	● Whitman	200
● Kitsap	680	● Thurston	75
● Spokane	454	● Whatcom	20
● Clallam	370		

**54%**

LMI Participants

## TOTAL PARTICIPANTS SERVED

**8,397**

Total Number  
of Classes

**284**

Special  
Presentation  
Attendees

**540**

Total Learner  
Hours

**9,819**

## PROGRAM PARTICIPANTS SERVED



**7,857**

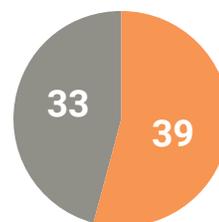
Foundations	5,489
Pathways	848
Footings	709
Sr. Citizen Prog.	408
Framings	198
SAFE	195
Forward	10

## VOLUNTEER DATA



New Volunteers Trained	355
Active Volunteers	90
Volunteer Hours	1,827

## PROGRAMMING PARTNERS



33

39

K-12 & Postsecondary  
Community Partners

## QUOTES FROM PARTICIPANTS

"I learned how to establish sound financial habits and also cash management."

- Anonymous

"The conversational style of the instructors and the information that was shared was very useful and presented in everyday language that was easy to understand and apply to real life."

- Anonymous

"This was very educational, it has helped me to create strategies around my finances."

- Anonymous

"Helpful information learning more about banking, savings, and spending."

- Anonymous

"Nice presenters, very relatable information, basic tips and advice on budgeting, etc. Always good to hear positive things and reminders to be focused on your goals."

- Anonymous

# 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 2023

## PERSONAL FINANCE KNOWLEDGE

Percentage of learners who know the key factors to consider when selecting a financial advisor	97%
Percentage of learners who know that a poor credit history results in a higher interest rate	95%
Percentage of learners who can correctly identify an example of a person's fixed expense	88%
Percentage of learners who can correctly identify an example of earned income	87%

## PERSONAL FINANCE CONFIDENCE

"I can apply what I learned today to my financial goals."	Agree 86%	Disagree 2%
"The information from the session will be useful to me in making future financial decisions."	Agree 86%	Disagree 4%
"I feel more confident in my ability to make good financial decisions after this session."	Agree 81%	Disagree 4%
"I feel more confident in my ability to seek information from reliable financial sources after this session."	Agree 77%	Disagree 4%
"My knowledge to make financial decisions increased as a result of this session."	Agree 76%	Disagree 10%

# Funding Partnerships

## \$50,000+

Department of Financial Institutions

## \$30,000+

Marie Lamfrom Foundation

## \$20,000+

Bank of America

## \$10,000+

Columbia Bank  
 Don and Julie Rugg  
 First Federal Bank  
 First Tech Credit Union  
 Johnson Bixby  
 Norcliffe Foundation  
 Robert D And Marcia H Charitable Trust

Russell Investments  
 Sharebuilder 410K  
 Sound Community Bank

## \$5,000+

Banner Bank  
 Cathay Bank  
 Catherine Holmes Wilkins Charitable Foundation  
 First Federal Foundation  
 First Financial Northwest Foundation  
 GoWest Credit Union Foundation  
 Heritage Bank  
 Kitsap Bank  
 Kitsap Community Foundation  
 Pacific Premier Bank  
 Seattle Bank  
 WA Trust  
 Woodworth Family Foundation

## \$2,500+

Marc Wright  
 On Point Credit Union  
 Seattle Alternative Association  
 Seattle Credit Union  
 Tiedemann Advisors  
 Washington Banker's Association

## \$1,000+

Amanda Lang  
 Grace Bussy Witten  
 Heidi Sexton  
 Medina Foundation

**THANK YOU DONORS  
 AND SPONSORS!**

## Financial Report

### TOTAL EXPENSES

381,604

### TOTAL INCOME

393,651



Corporate Donations \$166,00

Other \$79,243

Foundation Grants \$68,500

Government Support \$51,154

Individual Donations \$28,753

## 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** - Formerly BECU



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