



# Financial Matters

## 2021 Program Recap



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

### Annual Program Impact



**3,360**  
students



**28**  
educators



**24**  
schools



**45**  
volunteers

"I thoroughly enjoy volunteering with BestPrep. It is a phenomenal organization with an excellent staff. BestPrep is doing a great thing helping young adults and teenagers prepare for the future"

-Kristyn Martin, Jennings Experiential High School Educator

### Program Results

- 100% of teachers stated that their students' financial literacy skills were improved.
- 100% of teachers stated that students were given information and tools to help them make better educated financial decisions.
- 100% of teachers agree that students feel more confident and prepared to manage their finances.

*"The programs have helped my students gain a more real world perspective of economics and how it will apply to them upon graduating"*

-Amy Serck, Moorhead High School



## 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 adapted its programming to a virtual format. In addition to volunteer speakers presenting to virtual classrooms, BestPrep also created an online video library of presentations.

## 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

- In partnership with volunteers, BestPrep created five videos covering Financial Matters content to continue serving students during COVID-19
- Financial Matters staff revised the "Middle School Matters" presentation for students in grades 6-8 and created a new presentation, "Insurance Matters"



*"The students are learning valuable lessons about saving and investing, which typically are not taught in traditional school curriculums. It's a necessary and important life skill"*

-Ann Barnes, Roseville Area High School Educator

## 2020-2021 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

## 2020-2021 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  
 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  
 FamilyMeans/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 Smarts 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  
 TaTonka 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