



prosperity connection®

ANNUAL REPORT FOR 2022

The Path to Financial
Wellness Starts Here





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OVERVIEW

OUR MISSION

We strive to promote economic success for everyone in the St. Louis region by providing financial education and access to reliable financial products and services.

OUR VISION

We dream of an equitable community where everyone can conveniently access the resources and knowledge needed to confidently pursue their financial goals.

Through our **financial education and coaching**, we help St. Louisans build the **confidence, knowledge, and skills** to enhance their financial well-being.

OUR VALUES

- **Integrity**
- **Equity**
- **Respect**
- **Empathy**
- **Community**



OUR TEAM



OUR STAFF

Kathy Siddens, Executive Director
Heather Jaconis, Director of Finance and Operations
Sara Middendorf, Director of St. Louis Builds Credit
Robert Nelson V, Director of Coaching
Nikki Whetsell, Director of Communications and Advancement
Jamal Cooper, Associate Financial Coach
Ben Feimer, Lead Financial Coach
Veronica Guerrero, Lead Financial Coach
Sasha Moore, Lead Financial Coach
Carol Harris, Executive Project Manager
Julianna Nikodym, Marketing Associate
Heather Schindewolf, St. Louis Builds Credit Coordinator

OUR BOARD

Tom Boyle, VP of Car Sales at Enterprise
Eddie Davis, VP of Operational Excellence at Equifax
Suzanne Hough, VP of Community Development for Carrollton Bank
Tony Janssen, SVP & Regional Manager Commercial Real Estate at U.S. Bank
Susan Katzman, Secretary for the National Career Academy Coalition, retired from STL Public Schools
Felicia Pulliam, Co-Founder of St. Louis Renewed
Tom Sullivan, Club Director of Mathews-Dickey Boys & Girls Club
John Windom, Retired from STL Public Schools



2022 STATS AT A GLANCE

CLASSES

Classes Offered

70

Class Attendance

320 - unique -

489 - total -

COACHING

1-on-1 Sessions

1,310

Credit Report Reviews

475

Credit Fairs

28

KEY IMPACT METRICS



\$205,939 debt reduced by clients



\$46,695 saved by clients



61.4 points average credit score increase



SUMMARY OF ACTIVITIES

In 2022, Prosperity Connection achieved significant milestones which positioned us to continue our vital work and create even more meaningful community impact.

We focused on:

- **solidifying our organizational alignment**, ensuring that our team was working harmoniously and efficiently toward our shared mission
- **conceptualizing and launching an associate coach program**, expanding our capacity to help St. Louisans enhance their financial well-being
- **strengthening program partnerships**, expanding our ability to deliver transformative services and reach a wider audience
- **building out our Spanish programming** by hiring a bilingual coach, enabling us to serve diverse communities better
- **improving our branded imaging**, elevating our visibility and credibility
- **participating in two invaluable community programs**, Thanksgiving by Filament and the Taylor Community Consulting program at Wash U, further cementing our commitment to collaboration and community engagement



FEARLESS FUTURE

"Working with Sasha made me less fearful of checking bank account and credit card statements. That anxiety isn't there anymore."



Stephanie Blakley grew up in a rural area of Missouri where talking about money was considered rude. As she came of age, Stephanie realized that she lacked financial knowledge. She discovered Prosperity Connection through her Tower Grove CDC "HomeScreen" application and thought we could be a great resource for her clients at Youth in Need. While learning more about our financial education services, Stephanie realized that we could be a valuable resource to her as well! She began working with Sasha Moore to create a spending plan because she didn't have a grasp on how much money she was spending each month and the lack of accountability made it hard to stick with a budget.

With Sasha's support, Stephanie developed a spending plan suitable for her lifestyle and incorporated accountability methods. She now feels more capable of holding herself accountable to her financial goals. Those goals include refinancing her student loans, purchasing a car, and growing her savings. In fact, Stephanie is already making consistent, significant payments on her student loans *and* contributing a generous amount to her savings each month!



PC TRAILBLAZER!

Liz Myers is a trailblazer at Prosperity Connection. Several years ago, she built a solid financial knowledge foundation when she attended our classes and met with a former financial coach. She was even able to purchase a car because of our partnership with Enterprise, albeit at a less-than-ideal interest rate. After circumstances beyond her control caused her to stop meeting with her coach at the time, Liz realized she needed discipline in addition to knowledge. She joined Rung for Women and met Nikki Whetsell, where she focused on her relationship with money. By using activities like Money Habitudes, Liz learned how her emotions related to her spending. This helped her start discipline and accountability practices best suited for her.

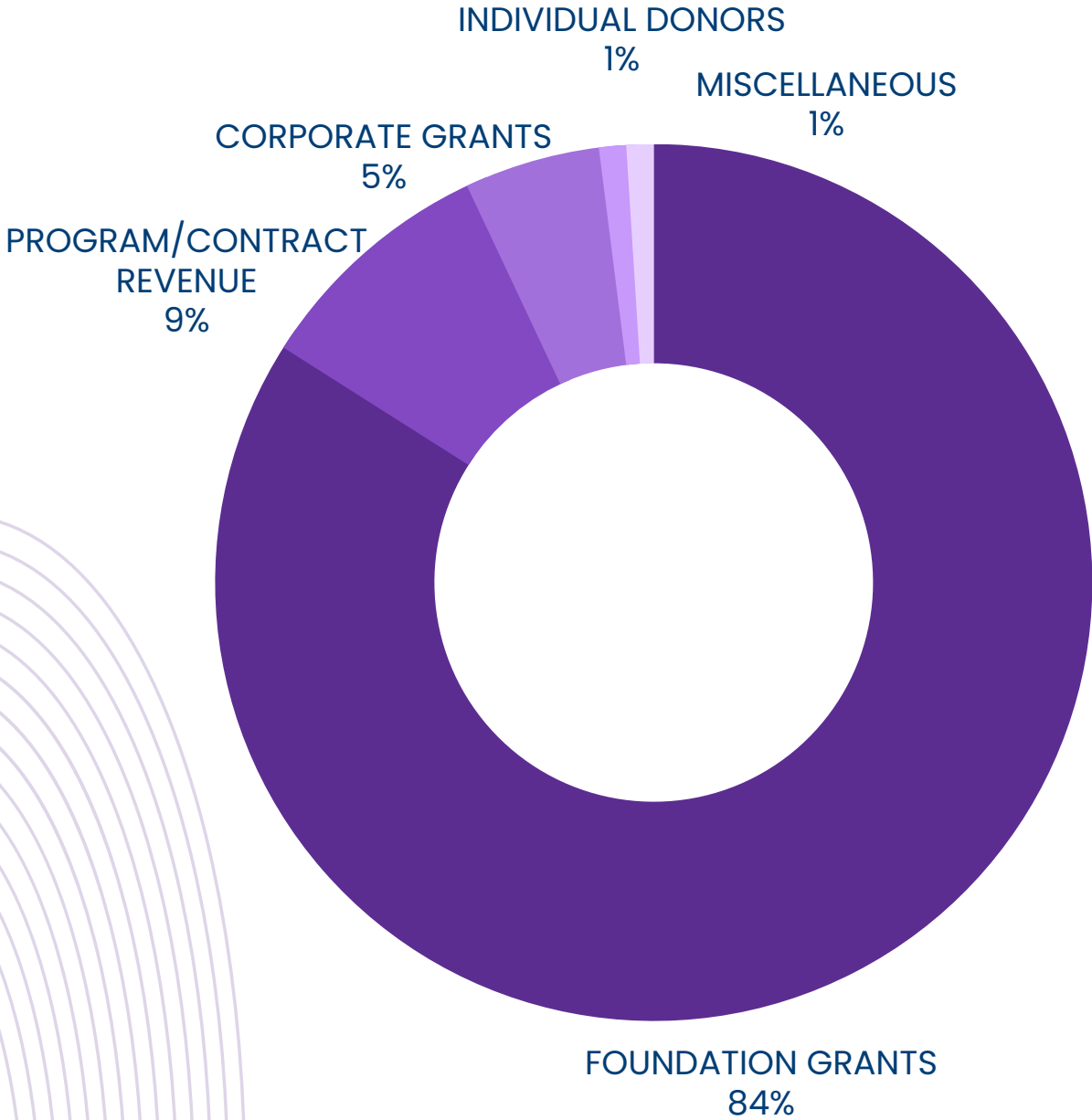
"I feel empowered and confident. I feel like I have control over my finances, credit, even my income!"



After Nikki's transition to a new role, Liz started working with Sasha Moore. Sasha helped her build on previous knowledge and focus on tightening her budget, creating weekly spending plans, cleaning up her credit report, and increasing her credit and savings. Liz is taking control of her finances and has achieved her goal of refinancing her car loan with Justine PETERSEN, saving her \$100 each month! She is on track to achieve her credit score goal by year-end and has also been able to get a checking and savings account as well as open a line of credit. Her long-term goals include learning to invest wisely, opening her own business, and purchasing a custom-built home.



SUMMARY OF FINANCIAL POSITION



OUR SUPPORTERS

A special thanks to our corporate and foundation funders, community partners, and individual donors. Because of you, 2022 was a huge success! Thank you for your generous support!!!

OUR FUNDERS

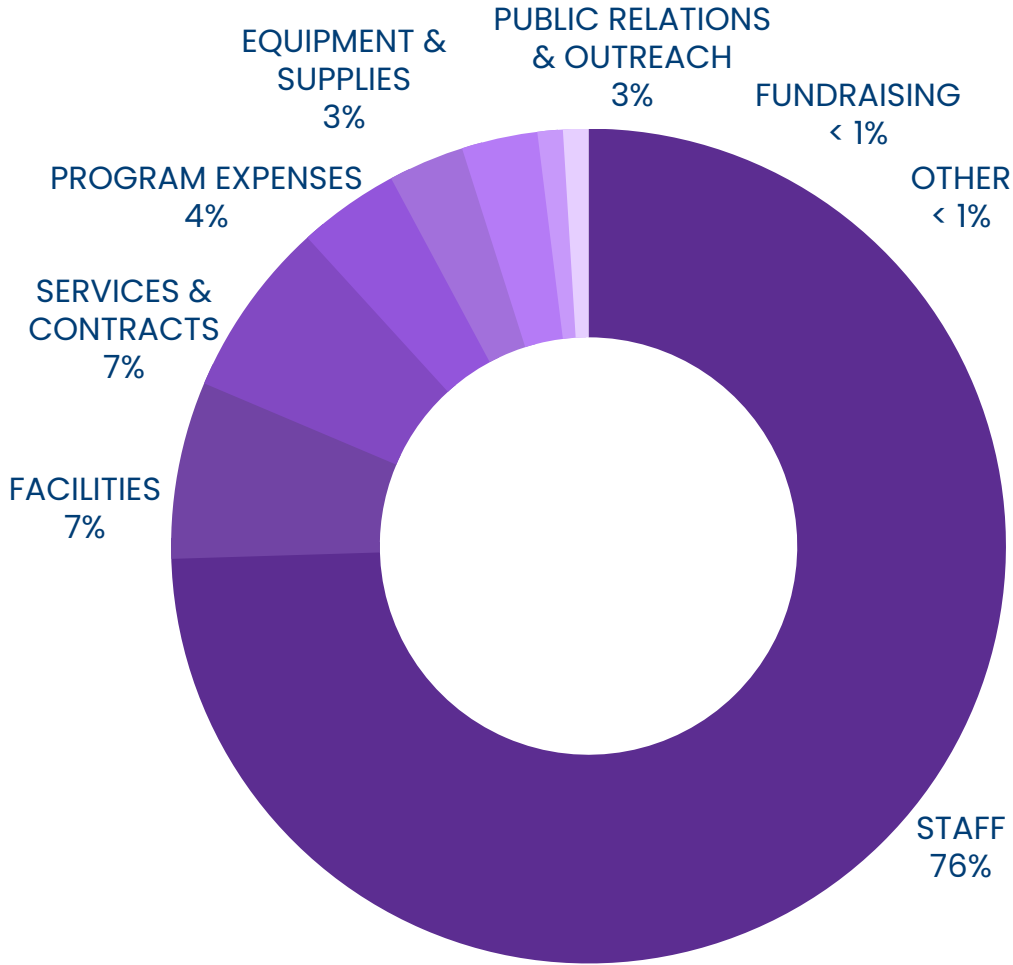
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Kari McAvoy
Lillian Murphy
Steve Niemira
Lisa Orr
Arturo Perez
Felicia Pulliam
Lisa Savoy
Rick Spiekermann
Mike Sullivan
Tom Sullivan
Gus and Jenn Vargo
John Windom
Prosperity Connection
Employees & Interns
SLCCU Employees



FINANCIAL ALLOCATION STRUCTURE



As a direct service provider, we allocate the vast majority of our budget to the best-in-class staff members that provide our financial education and coaching services to our clients.



QUESTIONS? CONTACT US!



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