



**Prosperity Connection
External Committee Notes**

*January 16, 2025
11:00 a.m. – noon (CST)
Zoom*

Agenda

- I. Call to Order – Attendance: Carly Carmosino, Nikki Whetsell, Kathy Siddens, Tom Boyle, Kristen Polchinski, and Carol Harris

See External Committee portal for detailed presentation

- II. Marketing and Communications
 - a. Outreach stats – down a bit due to the holidays in Facebook reach. Gained 32 net followers
 - b. Outcomes – Class pull-through rate Year-to-date is 41%, which is huge! YTD numbers are 722 for coaching and 349 credit reviews.
- III. Recent Gifts/Contracts – See slide deck –
 - a. Parkside Financial – 10K
 - b. Lots of individual gifts! We didn't promote Giving Tuesday, however received a lot of new individual donors.

Institutional Advancement

- c. Research/Applications
 - i. Q4 Applications
 - 1. Marillac Mission Fund - \$50K
 - 2. Midland States – reapplication 15K
 - 3. Pott Foundation – 10K
 - 4. Dana Brown Charitable Trust (partnership with Wyman)
 - 5. Light a Single Candle - \$50K
- IV. Updates
 - a. New Org Structure:
 - b. US Bank Sponsorship: Presenting sponsor of our Client Celebration in April. Committed to \$6000 to elevate and enhance the celebration.

- c. Speaking Opportunities: Presenting at CBA – Ben Feimer will be speaking. Hispanic Chamber wants Veronica and Pablo on their podcast, == as well as speaking for Carrollton Bank.
- V. What We Need Your Help With:
 - a. We are looking for other sponsors for the client celebration at Supporting Sponsor Level, or Individual Sponsors.
 - b. Share 2-3 additional individual names of people committee members think should attend our celebration as potential/interested partners.
- VI. Carol sends invites to Client Celebration for new committee members
- VII. Carly is working on getting Ben in front of union reps. Bring in PC during mental health month to talk about the connection between financial health and mental health.
- VIII. Adjourn