

FINANCIAL LITERACY

YEAR-END REVIEW

FUNDING THE FUTURE

2024

Reflecting on Success and Embracing
New Opportunities.



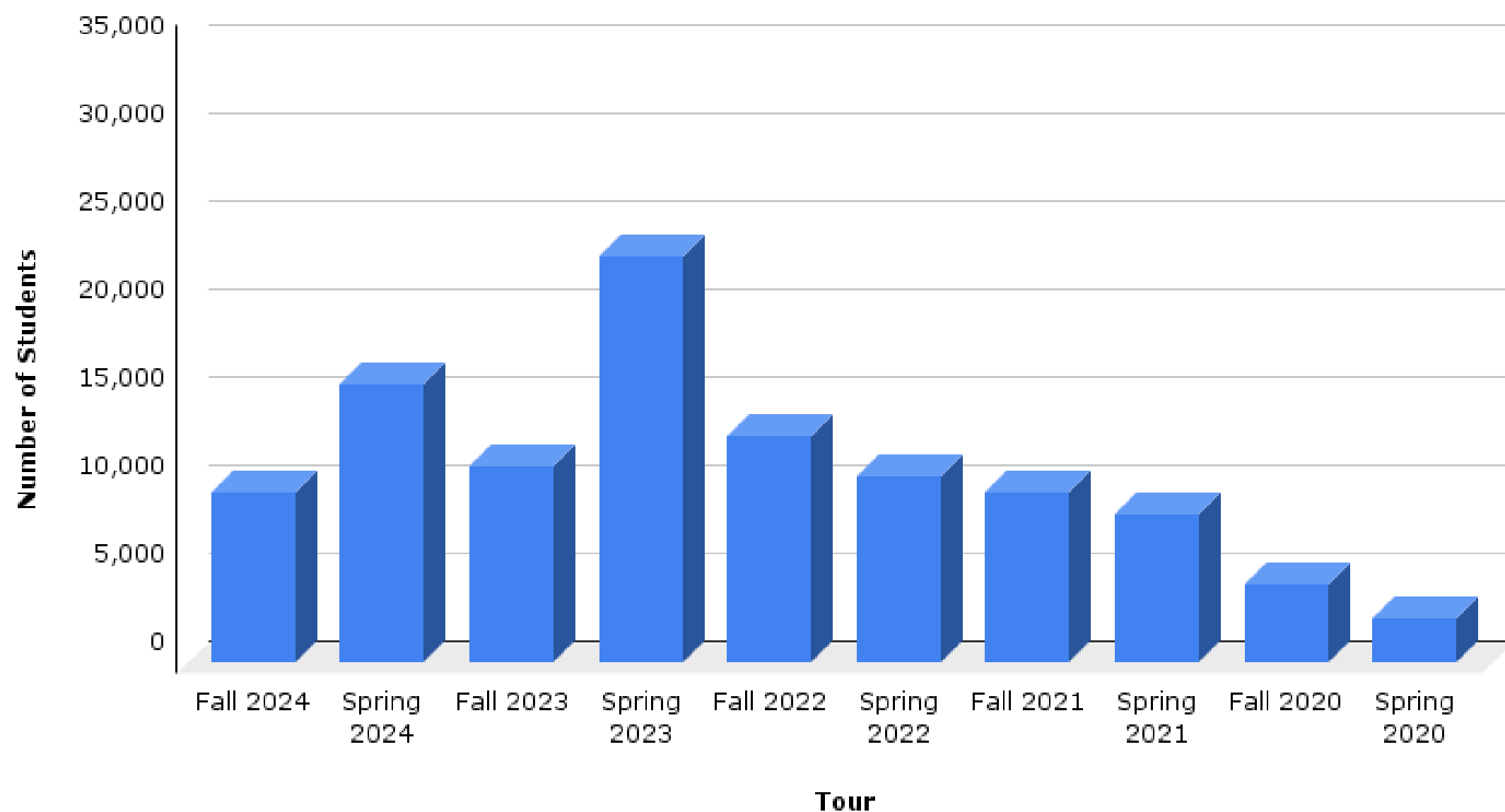


HIGHLIGHTS OF THE YEAR

“I thought it was a very engaging and informative show. The members of the band sounded great and brought amazing energy. Carter Hulseley was also very informative with the discussion of money and financial situations.”

Student (Nebraska)

Total Number of Students



✓ **Students Empowered**

25,500 students from diverse backgrounds, inspired to reach for their dreams

✓ **Consistent Engagement**

Both tours saw an average attendance of over 50% of the total student body at a school for each show.

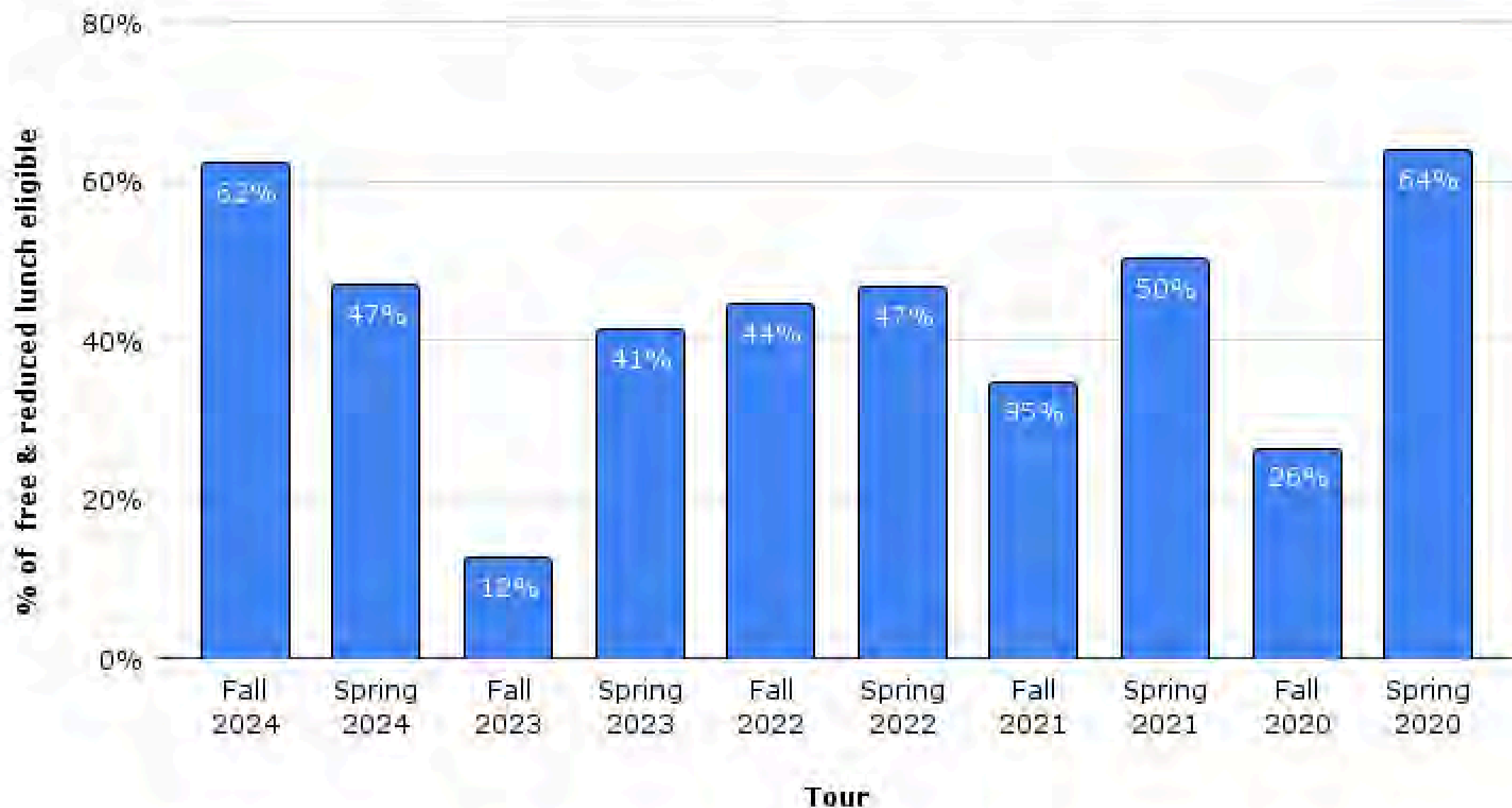


HIGHLIGHTS OF THE YEAR

“Their music was very well performed. They conveyed their message very well and showed us that it meant a lot to be economically smart. They were very nice backstage and I thoroughly enjoyed their company.”

Student (Iowa)

Free & Reduced Lunch Eligible



✔ Commitment to Inclusion

53% of attendees from free & reduced lunch eligible schools, underscoring our dedication to accessibility

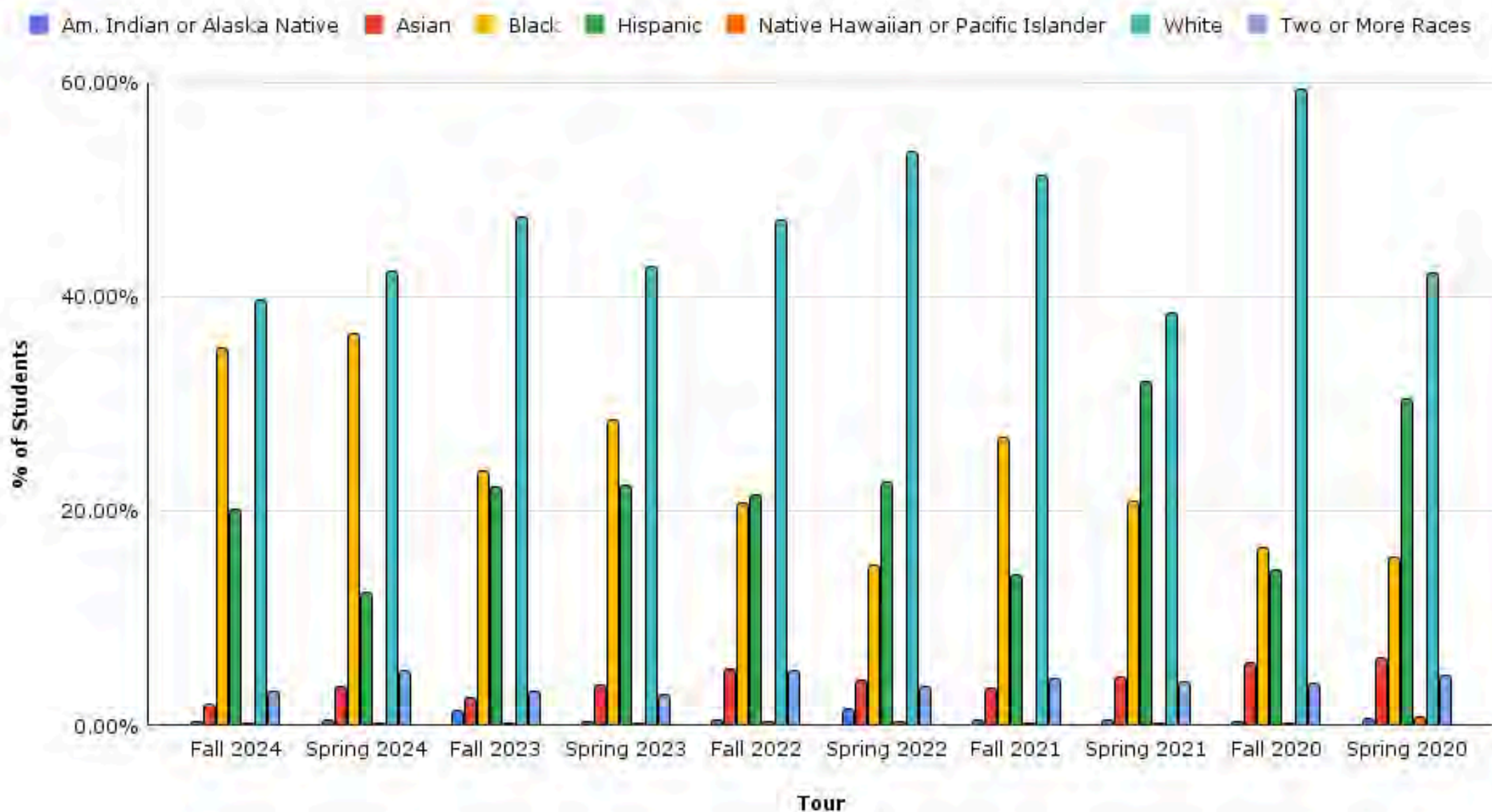


HIGHLIGHTS OF THE YEAR

“Pretty engaging, solid advice about the saving stuff. All in all, good presenter.”

Student (Colorado)

Student Demographics



✓ Commitment to Inclusion

On average for both tours:

- 41% White
- 36% Black
- 16% Hispanic
- 7% Other

KEY ACHIEVEMENTS



- ✓ **Broadening Horizons:** Our extensive travel schedule ensured that a wide array of communities benefited from our program.
- ✓ **Deepening Impact:** With over half of our attendees from free & reduced lunch eligible schools, we've reaffirmed our commitment to serving under-resourced areas.

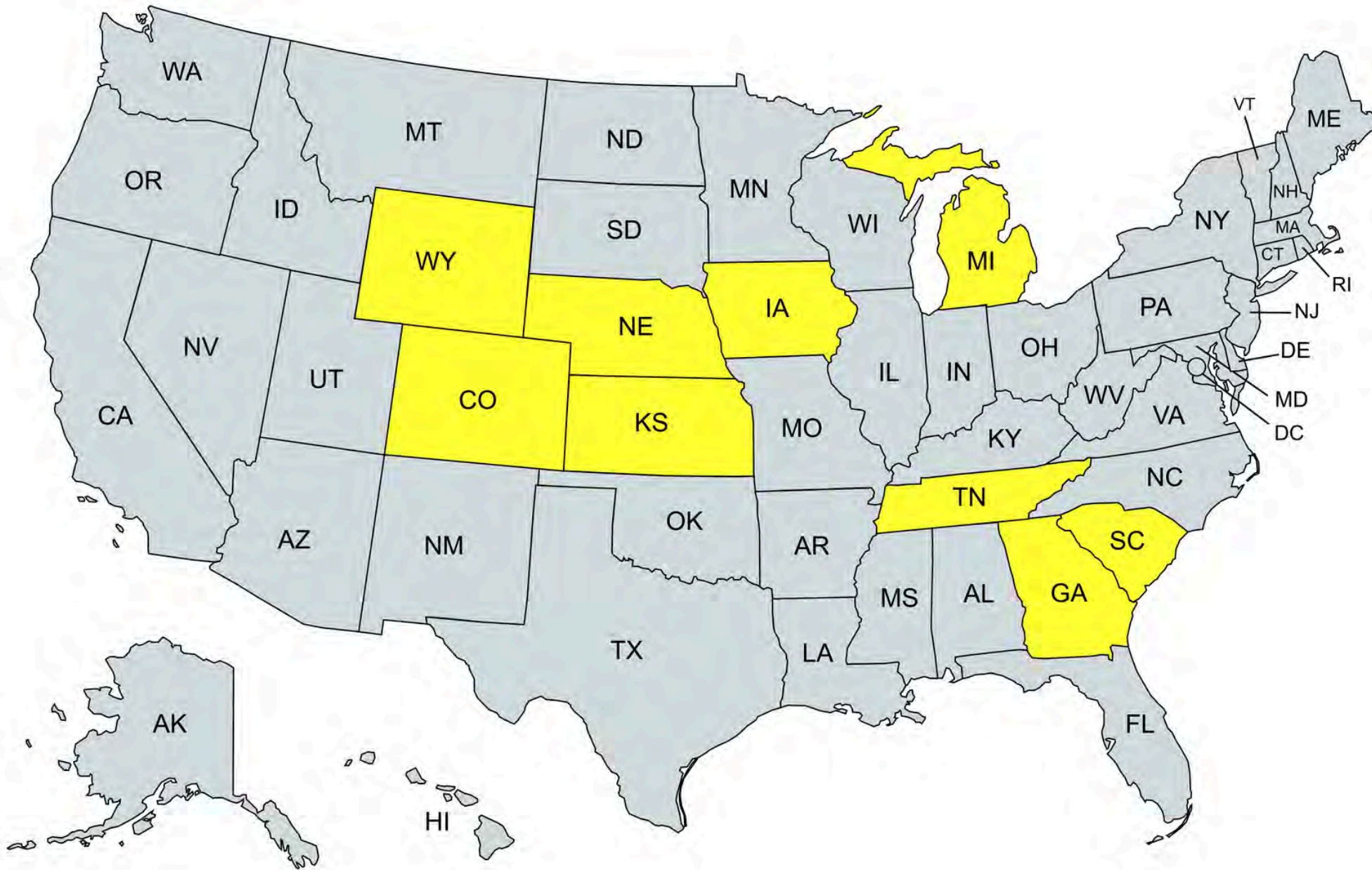


LOOKING FORWARD

SPRING 2025 TOUR

“I really enjoyed the real-life stories. They really helped with understanding different aspects of financial literacy.”

Student (Colorado)

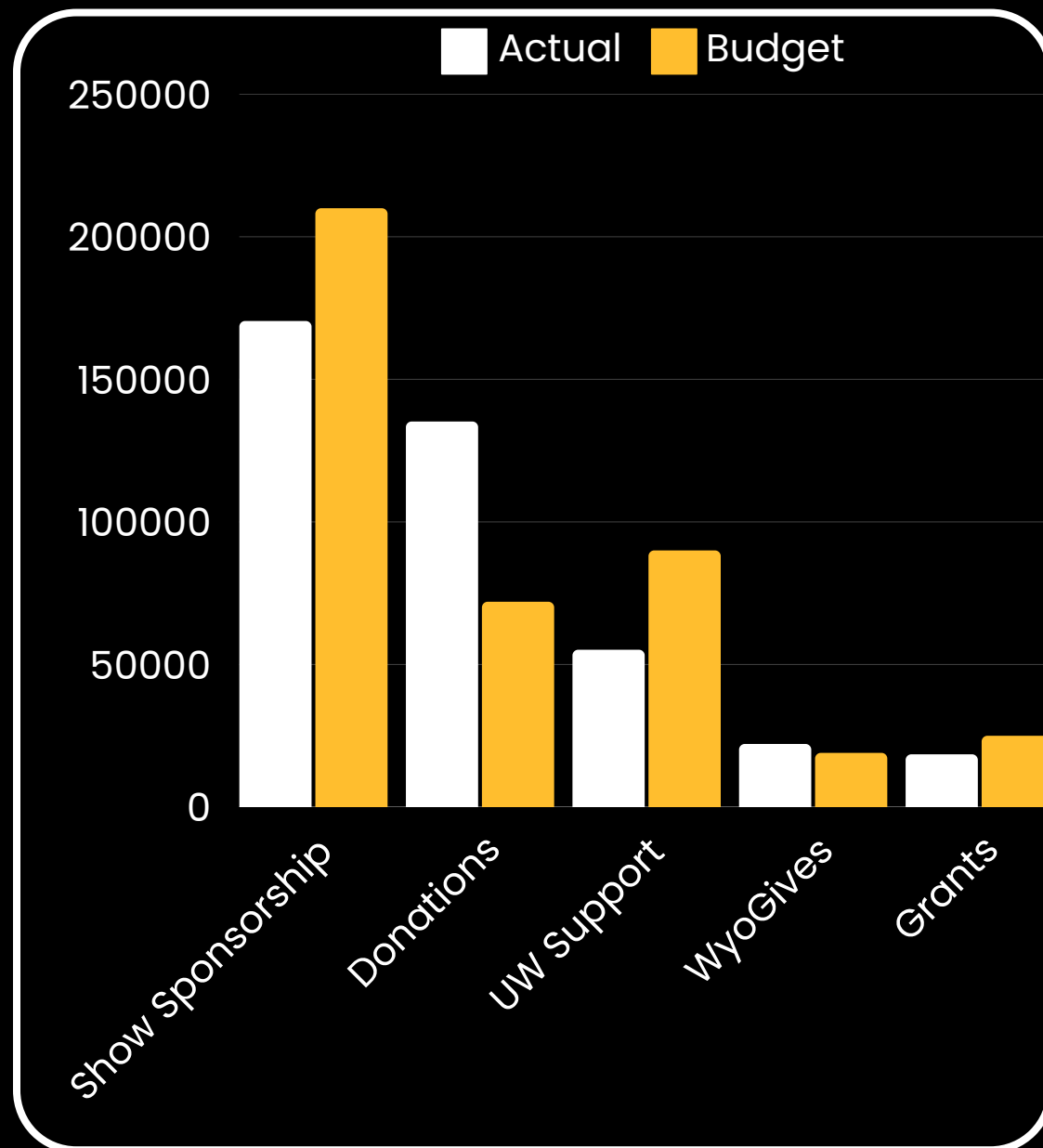


✔ Tour Schedule Snapshot

- 9 states
- 24 confirmed shows
- 3 additional shows are tentative
- Estimate 9,000 students

✔ Special Highlights

- Kansas multi-school show
- Wyoming FBLA Conference



FINANCIAL AND OPERATIONAL REVIEW

Revenue Breakdown: \$401,455 Total

• Show Sponsorships: \$170,450 (42.5%) • Individual/Business Contributions: \$135,206 (33.7%) • United Way Support: \$55,170 (13.7%) • WyoGives Campaign: \$22,129 (5.5%) • Grant Funding: \$18,500 (4.6%)

01

Financial growth in donations YOY.

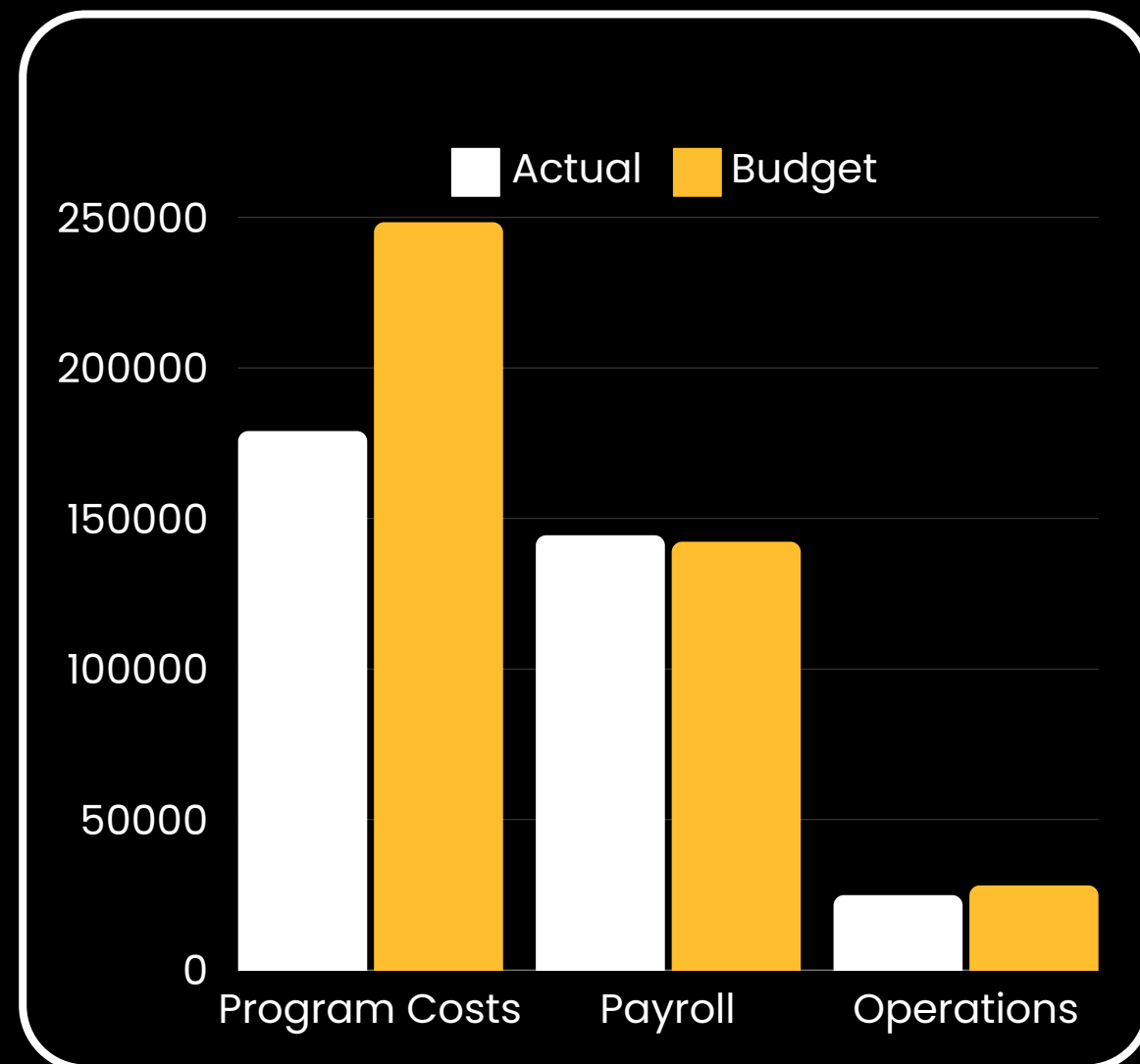
02

Underperformed on sponsorship targets due to fewer shows.



FINANCIAL AND OPERATIONAL REVIEW

Expenses Breakdown: \$347,829 Total
• Program Costs: \$179,038 (51.5%) • Payroll: \$144,423 (41.5%) • Operations: \$24,896 (7%)



01 Lack of shows in Spring.

02 Key operational Savings

PROGRAM INVESTMENT BREAKDOWN THE RIPPLE EFFECT

47 Sponsored Shows

- 77% Show Sponsorship Rate
- \$170,450 Total Show Sponsorship Revenue
- Average of 418 Students Reached Per Sponsored Show

Every dollar invested in Funding the Future creates waves of impact: • Each sponsored show reaches on average 418 young minds • Every \$1,000 donated transforms 73 students' financial futures • Each presentation plants seeds for lifelong financial wellness



COMMUNITY AND SOCIAL IMPACT

Strong community support demonstrated through high sponsorship rate (77%)

Efficient program delivery with 93% of expenses going directly to programs and necessary staffing

Diverse funding streams with five major revenue sources



Empowers students
for lifelong success.



Creates lasting
community
impact



GROWING OUR COMMUNITY OF SUPPORT

In 2024, we proudly welcomed three new financial industry leaders to our mission. BellCo Credit Union, Colony Bank, and NAIFA joined our community of supporters, helping us reach 25,500 students with critical financial education. Their commitment to financial literacy demonstrates the financial industry's dedication to building stronger, more financially savvy future generations.



Promoting
sustainability efforts



Supporting
local initiatives



GROWING OUR STRATEGIC PARTNERSHIPS

Georgia Secretary of State

- Enhanced relationship in 2024
- Added 16 new sponsored shows
- Demonstrates government partnership success
- Validates program effectiveness at state level

Raymond James Bank Partnership Growth

- Increased commitment in 2024
- Added 5 additional sponsored shows
- Strengthening financial sector relationships
- Shows sponsor satisfaction and ROI

Iowa Department of Insurance and Financial Services

- New partnership established
- 9 sponsored shows delivered
- Cross-state program validation
- Government agency endorsement



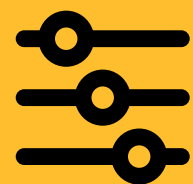


MEASURED IMPACT

FINANCIAL LITERACY GROWTH



Support school initiatives



Adjusting strategies



Gain insights in areas of effectiveness.



Program Improvement

Financial Literacy Growth

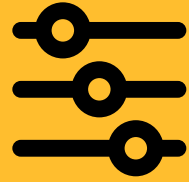
- Pre-Show Knowledge: 3.19/5
- Post-Show Knowledge: 4.19/5
- Net Knowledge Increase: 31.3%
- Action Step Readiness: 4.17/5

Students show significant knowledge growth (31.3% increase)

High action readiness score (4.17/5) indicates program effectiveness



Student Perspectives



Teacher Observations



Program
Validation



Demonstrating
Impact



MEASURED IMPACT VALIDATED THROUGH FEEDBACK

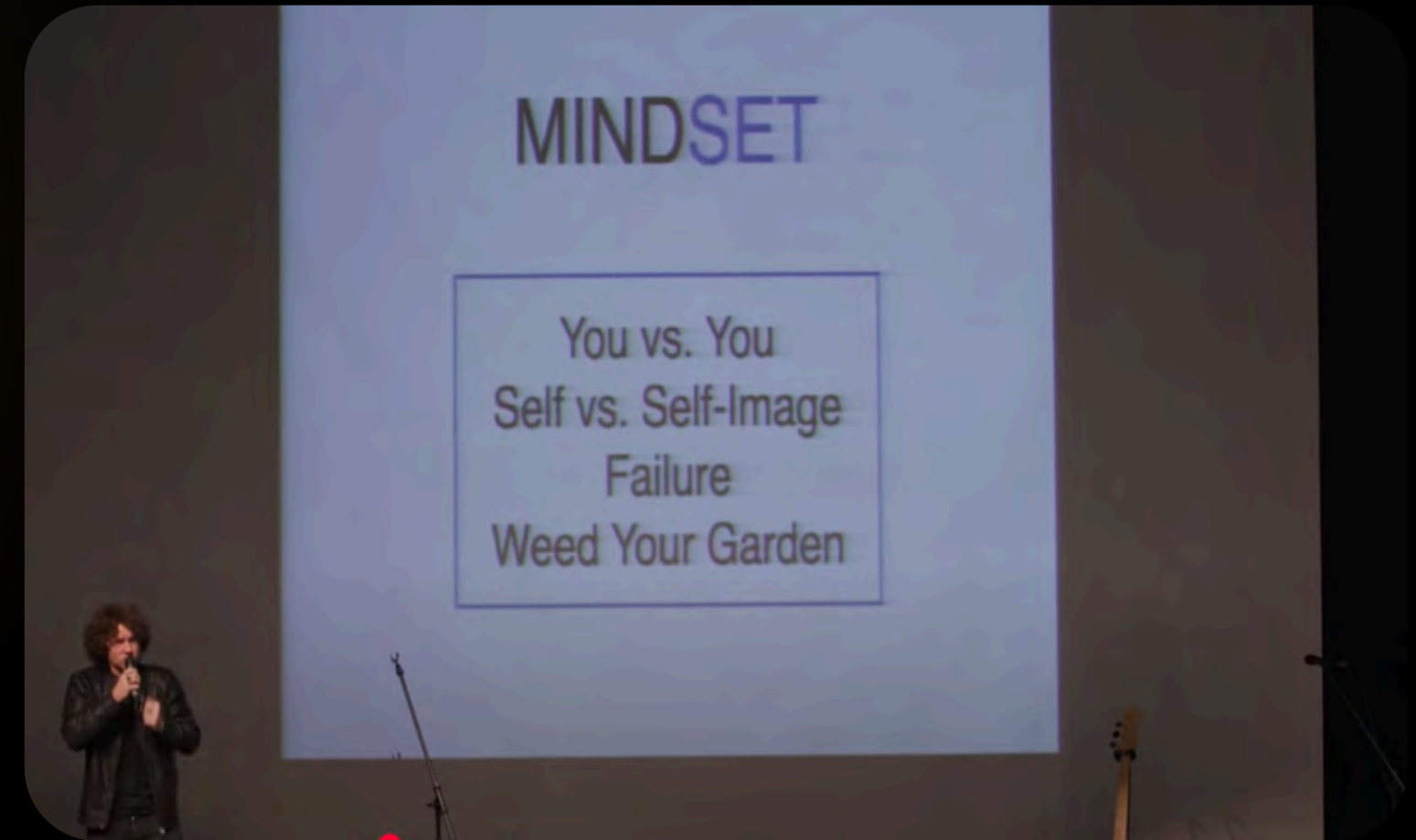
Educator Confirmation: "Very fun for the students! One of the best assemblies that I have ever seen in my 37 years of teaching!"

Student Experience: "Most of our assemblies so far have been either boring or uninformative, but this one was great!"



LOOKING AHEAD TO THE NEXT YEAR

Building Brighter Futures Together!



- Expanding our reach to empower more students and communities.
- Strengthening partnerships to amplify our impact.
- Advancing our mission to make financial literacy a priority nationwide.

Together, we'll make 2025 our most
impactful year yet.

STATEMENT OF PURPOSE

MISSION & VISION STATEMENT

At Funding the Future, our mission has always been to empower young people through financial literacy. Over the years, our organization has grown in scope, impact, and vision. With these advancements, we recognize the need for a refreshed mission and vision statement that better reflects who we are today and where we are headed.



This proposed update is driven by several key factors:

- Reflecting Our Evolution:
 - Since our founding, we've expanded our reach, refined our methods, and deepened our commitment to empowering students, families, and communities through financial education. Our mission and vision statements must encapsulate this evolution.
- Clarifying Our Impact:
 - Financial literacy is not just about individual success; it's about fostering stronger families and more resilient communities. Our mission and vision need to convey this broader, transformative impact.
- A concise, forward-thinking mission and vision statement will better communicate our purpose to students, educators, partners, and sponsors, strengthening their connection to our cause.

STRATEGIC GROWTH NATIONAL SPONSORSHIP OPPORTUNITY



Value Proposition for National Sponsor:

- Direct youth engagement
- Measurable impact metrics
- Brand association with innovation
- Educational goodwill
- Multi-market presence
- Proven engagement model

Ready for Growth:

- Proven educational impact
- Engaging content delivery
- Strong data collection systems
- Professional performance team
- Established curriculum

Current Program Efficiency:

- Demonstrated cost-effective delivery
- Strong regional sponsor success
- Established performance model
- Scalable program structure

STRATEGIC GROWTH

BOARD EXPANSION PRIORITIES



Board Member Value Proposition:

- Guide innovative educational approach
- Impact youth financial literacy
- Shape national expansion strategy
- Connect with purpose-driven leaders
- Leverage professional expertise

Strategic Expertise:

- Corporate Sponsorship Experience
- National Program Scaling
- Educational Partnership Development
- Financial Industry Connections

Key Market Influence:

- Key market presence
- National network connections and Multi-state experience

CALL TO ACTION



Looking ahead, we're excited for the opportunities in front of us. Together, we can build on this momentum to reach even more students, expand our programs, and make an even greater impact

As key leaders of Funding the Future, we ask all board members to actively participate in this journey—by sharing our mission, engaging new sponsors, and helping us advocate for shows in schools in your area. Your involvement is essential to our success.

