

2022 Annual Report



PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

MOVING OUR WORK FORWARD



Dear P+P Friends and Supporters,

In this – our 51st year – we found much to celebrate while facing the challenges of a worldwide pandemic. The past two years have proven to be a transitional period for Prepare + Prosper in many ways. Along with our leadership and staffing changes, the entire organization gracefully pivoted in response to extraordinary circumstances.

We created new systems and new procedures to meet the needs of our customers with fewer volunteers due to necessary Covid precautions. But we met that demand in 2021 by helping 9,132 customers file their taxes, 87 Money Mentors participants reach their goals with financial coaching assistance, and 119 people enroll in new Fair checking, savings and credit building accounts. That demand rose in 2022 with 19,943 tax returns filed, 14,291 volunteer hours given, and 616 sole-proprietors filing their small business taxes.

On behalf of the leadership team and the board of directors, we are immensely proud of and grateful for our permanent staff, our volunteers, and our seasonal staff in helping us through these transitions. We are also grateful to those who have helped us step more diligently into the equity and inclusion work in the wake of the killing of George Floyd. Our DEI work has become an important and ongoing focus of our work with each other, with the communities we serve, and in our broader efforts for racial economic justice in Minnesota.

While our tax and financial services program is going strong, I also want to highlight the wonderful work of our financial capability programs. Money Mentors took the lead in bringing flexibility to service delivery, allowing participants and coaches to arrange meetings in the manner that best fit their lives—virtually, in the office, or in community locations. FAIR Banking is continuing to find new ways to eliminate barriers by eliminating the \$3 monthly checking maintenance fee for all customers through the end of this year.

We belatedly celebrated our 50th anniversary in April of 2022. Founded in 1971, this organization has grown through many directors, many locations, and even many names. Our celebration highlighted five decades of living out our mission: To build financial well-being through free tax preparation and financial services, products, and coaching, and by changing systems to create economic opportunity for all.



This work is possible because of partners like you, standing with us, working together to ensure the customers and communities who depend on us will be served. We thank you for your support.

Sincerely,

Suyapa Miranda
Executive Director
July 2022

BUILDING BRIGHTER FINANCIAL FUTURES



About 66% of the U.S. population struggles to spend, save, borrow, and plan financially.

These same households contribute 84% of total spending on interest and fees for everyday financial services, and spend a greater share of their income compared with those who are financially healthy. (Source: [Financial News Network](#).)

Prepare + Prosper, a nonprofit organization, works to build financial well-being and create economic opportunity.

In partnership with our volunteers, P+P works with low- to moderate-income people to build financial well-being through free tax preparation and financial services, products, and coaching, and by changing systems to create economic opportunity.

We're working locally and nationally to reshape the financial landscape to offer innovative programs, products, and resources that build wealth—not strip it—for individuals + families to build brighter financial futures.

We work in partnership with people, communities, and systems to break down barriers and develop solutions for financial opportunity and success.

We have over 50 years of experience serving our community, influencing our field, and making an impact.

We know real change requires work at every level. We move this work forward nationally by:

- **Building and honing programs, practices, and approaches**
- **Sharing what we know and learn with colleagues and policy makers**
- **Playing leadership roles that help move our field and collective work forward**



Programs and Services

Free tax preparation + financial services: A holistic approach to tax filing that leverages the time and talent of **IRS-certified volunteers** to help taxpayers and **small business owners** navigate the tax code, claim all credits they've earned, and maximize tax time's impact on their financial future. We serve individuals making \leq \$35,000 and families or sole-proprietors making $<$ \$55,000 annually. All volunteers go through up to 20 hours of training.








Money Mentors financial coaching: Support for people working to reach their financial goals in the form of **one-on-one coaching** from a trained volunteer paired with **peer sharing and learning**. Participants in coaching are significantly reducing debt, increasing savings, improving credit scores, growing their income, and finding a partner in their finances.

FAIR Banking Program: Accounts for households who are **financially marginalized** and spend too much of their time and money operating in a financial world not designed to meet their needs. FAIR consists of **checking, savings, and credit builder accounts**, provided by Sunrise Banks and distributed through community organizations. FAIR is designed to be scaled nationally.

Changing systems: We advance and strengthen policies and practices to support **a more equitable tax code and wealth building** for low- to-moderate-income households. We mobilize people we work with to support this work. When the Minnesota legislature is in session, P+P partners with the **Minnesota Budget Project** and **Minnesota Asset Building Coalition** to protect and expand low-income tax credits like the **Minnesota's Working Family Credit**, advocating for increases in state funding for free tax prep and, and **securing funding for FAIR**.



2022 Accomplishments*

-  8,336 taxpayers filed 19,943 tax returns for free
-  Over \$16.2 million in tax refunds were returned
-  312 volunteers donated 14,291 hours
-  292 taxpayers saved \$762,363 of their tax refunds
-  Out of 103 people participating in our coaching program, 45 people reached their financial goals
-  616 sole-proprietors filed their taxes and many more received help managing their businesses
-  123 people enrolled in 177 FAIR accounts— 53 checking, 96 savings, and 28 credit builder accounts

Learn more:

For partnership opportunities contact Priscila Rockwood, Engagement Manager, priscila@prepareandprosper.org

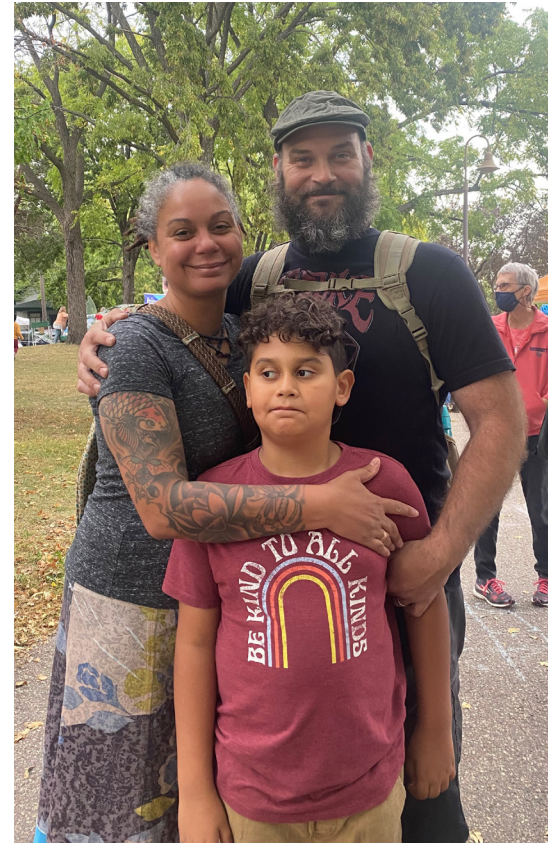
prepareandprosper.org

*As of Nov. 1, 2022

STATEMENT OF FINANCIAL POSITION

7/1/2021 - 6/30/2022

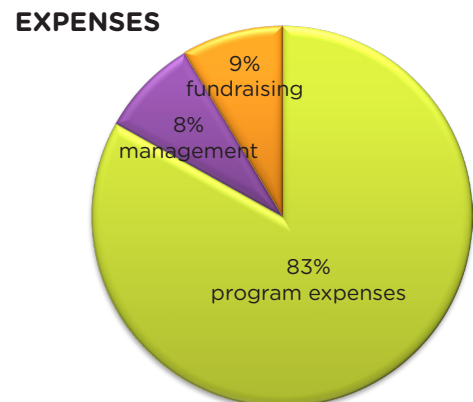
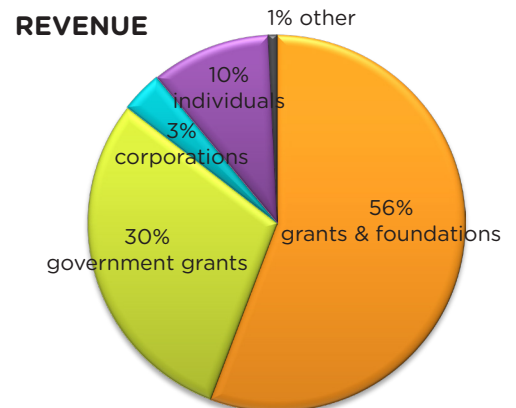
ASSETS	FY 2022	FY 2021
<i>Current assets</i>		
Cash & cash equivalents	\$2,047,315	\$2,104,620
Grants & other receivables	7,555	7,555
Other current assets	213,572	425,919
Total current assets	\$2,268,442	\$2,538,094
<i>Non-current assets</i>		
Furniture & equipment	\$62,852	\$58,808
Leasehold improvements	41,667	41,667
Less accumulated depreciation	(75,913)	(79,544)
Endowment investments	212,240	236,232
Total non-current assets	\$240,846	\$257,163
TOTAL ASSETS	\$2,509,288	\$2,795,257
<i>LIABILITIES</i>		
<i>Current liabilities</i>		
Accounts payable	\$11,815	\$17,373
Accrued expenses	96,276	81,828
Notes payable	0	225,000
Total liabilities	\$108,091	\$324,201
<i>NET ASSETS</i>		
Unrestricted	\$1,904,615	\$1,270,324
Restricted	496,582	1,200,732
Total net assets	\$2,401,197	\$2,471,056
TOTAL LIABILITIES & NET ASSETS	\$2,509,288	\$2,795,257



STATEMENT OF ACTIVITIES

7/1/2021 - 6/30/2022

SUPPORT & REVENUE	FY 2022	FY 2021
Grants & foundations	\$1,184,529	\$1,061,250
Government grants	632,315	1,017,300
Corporations	75,839	127,334
Individuals	217,618	283,617
Other	(17,544)	57,961
Program fees	780	1,644
In-kind contributions	36,965	14,707
Special events	(5,241)	592
TOTAL SUPPORT & REVENUE	\$2,125,261	\$2,564,405
<i>EXPENSES</i>		
<i>Program</i>		
Tax & financial services	\$1,196,740	\$1,075,660
Financial capability	237,318	185,700
FAIR	390,381	588,213
Total program	\$1,824,439	\$1,849,573
Management & general	\$183,084	\$189,519
Fundraising	187,597	217,788
TOTAL EXPENSES	\$2,195,120	\$2,256,880



2021 VOLUNTEERS

Mark Adrian • Andrea Aerts • Kennedy Aeshliman • Babatola Agboola • Yohannes Agegnehu • Hibaq Ahmed • Martina Alden • Abby Alldaffer • Cathy Allen • Stephanie Alliev • Linda Amey • Eileen Andersen • Lindy Anderson • Mark Anderson • Todd Anderson • Michelle Andrews • Octavious Ballah • Maureen Bartolotta • Sarah Batz • Tony Bauer • Lois Beckmen • Ann Behmler • Joan Bennett • Rhonda Bjurlin • Megan Bloomquist • Marsha Blumenthal • Josh Bohl • Genevieve Bolling • Andrea Bond • Patty Bongaarts • Heather Bonneson • Kimber Borders • Zahra Bougataia • Patrick Boylan • Chanel Brewer • Nicole Bridgland • Missy Brooks • Don Broscha • Mark Brossart • Tony Brown • Gretchen Burke • Katie Callaghan • Greg Clemente • Evan Coakley • Eric Cooperstein • Mike Corazzo • John Couch • Bob Cox • Saundra Crump • Leslie Cruz • Stefanie Currier • Jenny Dahl • Linda Dahl • Wanda Davies • Bill Davnie • Victor de Meireles • Any Defo • Chip Delaney • Sasha Denisova • Gwen Denninger • Azeb Desta • Jana Dietering • Thaine Dirks • Dan Dixon • Mike Doran • Olivia Dorow • Hovland • Catie Doucette • Bob Dufek • John Duncan • Jane Eastwood • Paul Ebert • Pat Ecklund • Bart Eddy • Mary E Egan • Khalid Elhassan • Cheryl Ellefson • David Engelsgaard • Debrah Engen • Doug Engen • Casey Epstein • Bob Erickson • Justin Evenhouse • Andrea Everling • Christina Everling • Tiana Falconer • Michael Farnham • Becky Finnigan • John Firkus • Alex Fischer • Erin Fitzgerald • Mary Fitzimons • Eric Fogt • Ryan Folz • Virginia Franco-Omana • Katie Frazier • Mary Freeman • Cheryl Funk • Leo Gabriel • Colleen Gaichas • Becky Gamble • Rich Gamble • Joan Gangl • Michael Garbis • Robert Garfinkle • Aster Gemech • Mark Gilbert • Steve Gilbertson • Andy Gillund • Lucia Gonzalez • Caitlin Goodrich • Grace Gossen • Marcela Gratke • Anna Greenstein • Kirsten Gregerson • Jim Gregorich • Chris Grewell • Tiarra Griffin • John Griffiths • Brenda Grove • Jianjin Gui • Gayl Gustafson • Doug Gwost • Hana Ha • Michele Hajek • Jerry Halbach • Valencia Hamilton • Ryan Hampton • Anne Hanson • Lisa Hario • Shawn Hartfeldt • Anne Hartman • Judy Hauritz • Mark Hayes • Peter Hendricks • Bob Hendrickson • Sophia Hill • Joe Hobson • Aggie Hoeger • Keely Hollahan • Jeff Holland • Jay Homan • Alan Hopeman • Clayton Hottinger • Anna Houghland • Sue Hults Sellnow • Jeff Isaacson • Judy Jablonski • Steve Jaciuk • Nathan Jacob • Tyler Jacobsen • Daniel Jandro • Bec Johnson • Kelly Johnson • Pam Johnson • Sherry Johnson • Elizabeth Jonker • Jim Jordan • Andrew Juneau • Jaren Kaddatz • Matt Kaney • Simegn Kassa • Peter Kataras • David Katz • Devon Katz • Sara Kaufman • Raina Kelly • Orit Kidron • Katie Kienbaum • Phil Kilpatrick • Gigi King • Joe Klein • Katie Kong • Yana Koretska • Cindy Kraemer • Scott Kringle • David Kula • Vicki Kunerth • Katie LaGrange • Robbie Langenfeld • Michele Langer • Leanna Latanision • Trixie Le • Gisela Lee • Julie Lee • Youa Lee • Andrew Leonard • JoAnn Leppink • Amanda Levasseur • Maya Levitan • Deborah Lewis • Jiashu Liu • Liz Lomauro Igo • Giles Lommel • Steffi Lopez • Taylor Lubich • Taylor Lynch • Jeffrey Maas • Heather Magers Keefe • Pati Maier • Cheryl Majd • Jose Maldonado • Lynn Malfeld • Mike Malloy • Sam Marquardt • Tom Marshall • Tim Martin • Phil Martinson • Valerie Martinson • John Mattson • Sandy McGehee • Kevin McGlauchlen • Kara McGuire • Rachel Merrifield • Kate Mertz • Sarah Michaelson • Jumy Miko • Nathan Moen • Jennifer Moline • Emma Molls • David Moore • Doug Moore • Kathy Morneau • Liz Murray • Jim Myott • James Neild • Kevin Nelson • Michelle Newell • Ngan Nguyen • Sophie Nikitas • Mark Nolen • Dale Nordquist • Jody Norling • Russell Nour • Sarah Oberlander • Bill Oberreit • Jenna O'Connor • Bob O'Keefe • Shola Oladipupo • Lisa Olberg • Dave Olsen • Deb Olson • Peter Olson-Enamorado • Kathy Onken • Jenni Oprosko • Humphrey Otita • David Outzs • Mariana Ovtcharova



2021 VOLUNTEERS (continued)

• Christine Page • Mridula Pandey • Mark Panger • Rosa Pedersen • Kalyn Pennings • Anna Petrangelo • Cheryl Pexa • Trang Phan • Frances Piper • Scott Plewka • Jim Pogue • Any Porter • Rachel Provence • Julia Quanrud • Liz Raimann • Orissa Ramnarine • Joey Rasmussen • Delores Ratliff • Emily Resseger • Ryan Rich • Carrie Roach • Rebecca Robinson • Ali Rodway • Les Rogers • Angelica Romero • Peixian Rong • Diane Rosenwald • Dave Rosewall • Becky Ross • Sara Rothers • Grant Rovang • Linda Ruecker • Flossie Russ • Karen Ryan • Alessandra Sabra Durose • Brianna Sadler • Lisa Sahli • Ethan Schachtman • John Schaefer • Barb Schaepe • Bob Schafer • Jaime Schammel • Ed Schepers • Jacqueline Schmitt • John Schmittdiel • Melanie Schuler • Nate Schwarz • John Seltz • Lou Setterquist • Ben Sherrard • Deb Sherrer • Brian Shields • Lyndon Shirley • Doug Silge • Linda Silver • Sharon Sims • Charles Sislo • Kelly Sittig • Stephanie Skarolid • Rob Slanger • Rebecca Sluss • Marty Smith • Susan Sochacki • Grace Song • Julie Sonier • Bounna Southaya • Michael Splendore • Jon Spoerri • Tomek Srienc • Paul St. Martin • Foster Stangel • John Stefany • Meghan Stelzig • Roger Stoick • Chandra Stone • Dara Stone • Brian Strittmater • Sam Strom • James Stuart • Maddison Sumners • Greg Swanson • Chase Swenson • Julia Tabbut • Erica Tande • Tom Tangen • Chang Thao • Mary Thomas • Kelly Thompson • Michael Tierney • Tom Timmons • Chip Treen • Paul Tsai • Carol Tveite • Mike Tveite • Pangia Vang • Lynn Vara • Rich Vignes • Emily Wade • Kaylee Wagner • Toby Walecka • Ted Wanous • Bob Ward • Reggie Wardoku • Laine Warwick • Ellery Wealot • Bill Welke • Paige Wendland • Bill Werb • Catherine Wernecke • David Westlund • Kevin Whalen • Mary Wickersham • Anja Wiesner • Steve Willett • Cheryl Willis • Chris Wittich • James Woelfel • Barb Woodruff • Mary Jo Woolf • Taylor Woommavovah • John Wottrich • Matt Wright • Adam Wrucke • Janie Xiong • Gabriela Yanez • Pa Yang • Va Yang • Linnea Yeazel • Kevin Yee • Danny Ying • Charles Young • Yi Yu • Cathy Zemmels • Ben Zilberman • Diana Zimny • Amy Zinniel • Eugene Zylla



2022 VOLUNTEERS

David Aamot • Adam Jurgen • Natasha Adams • Andrea Aerts • Frank Alarcon • Abby Alldaffer • Cathy Allen • Susan Allison • Blake Almberg • Linda Amey • Deena Anders • Eileen Andersen • Mark Anderson • Colleen Anson • Cindy Armstrong • David Arndt • Hana Assefa • Maureen Bartolotta • Sarah Batz • Tony Bauer • Lois Beckmen • Karen Bedore • Ann Behmler • Kathleen Bennett • Jeff Benson • Yosef Beshu • Daisy Bjork • Kade Blankenship • Marsha Blumenthal • Josh Bohl • Mary Bolla • Genevieve Bolling • Andrea Bond • Grace Bonfig • Patty Bongaarts • Kimber Borders • Chris Boulton • Patrick Boylan • Nicole Bridgland • Don Broscha • Mark Brossart • Annika Brown • Scott Bryson • Georg Ann Burns • Chuck Bye • Kate Byrne • Al Campbell • Luke Carlson • Jerry Carroll • Jen Cleveland • Rina Cooper • Mike Corazzo • John Couch • Anna Cousin • Bob Cox • Sandra Crump • Linda Dahl • Wanda Davies • Bill Davnie • Victor de Meireles • Chip Delaney • Angie Denchfield • Sasha Denisova • Gwen Denninger • Gail Dexter • Thaine Dirks • Olivia Dorow Hovland • Catie Doucette • Mena Duarte • Bob Dufek • Paul Ebert • Bart Eddy • Cheryl Ellefson • David Engelsgaard • Doug Engen • Anne Epstein • Bob Erickson • Adam Faitek • Tiana Falconer • Michael Farnham • Nelson Fernandes • John Firkus • Amy Fisher • Mary Fitzimons • Eric Fogt • Ryan Folz • Leo Gabriel • Colleen Gaichas • Gelly Garay-Triviski • Michael Garbis • Robert Garfinkle • Kim Gharrity • Mark Gilbert • Steve Gilbertson • Nancy Gildin • Andy Gillund • Ryan Girjanand • Luke Gitzen • Kirsten Gregerson • John Griffiths • Brenda Grove • Jianjin Gui • Gayl Gustafson • Doug Gwost • Michele Hajek • Jerry Halbach • Valencia Hamilton • Anne Hanson • Cindy Hanson • Lisa Hario • Anne Hartman • Austin Heckmann • Peter Hendricks • Bob Hendrickson • Heather Henneman • Sophia Hill • Aggie Hoeger • Keely Hollahan • Jeff Holland • Gerry Holt • Alan Hopeman • Bladen Hopkins • David Horn • Anna Houghland • Laurel Hunt • Adam Irving • Jeff Isaacson • Judy Jablonski • Steve Jaciuk • Bashir Jamal • Daniel Jandro • Hilary Johnson • Pam Johnson • Sherry Johnson • Bill Johnston • AJ Joshi • Mary Karcz Kloc • Peter Kataras • David Katz • Sara Kaufman • Fatuma Kedir • Raina Kelly • Aaron Keniski • Katie Kienbaum • Yana Koretska • Cindy Kraemer • Scott Kringle • Mia Krohn • David Kula • Katie LaGrange • Dat Lai • Michele Langer • Leanna Latanision • Gisela Lee • Youa Lee • Maya Levitan • Deborah Lewis • Laura Lodin • Liz Lomauro Igo • Giles Lommel • Amanda Longley • Zach Luepke • Lindsay Lundberg • Jeffrey Maas • Heather Magers Keefe • Cheryl Majd • Lynn Malfeld • Sam Marquardt • Zuly Marquez • Tom Marshall • Erik Martens • Valerie Martinson • Sandy McGehee • Kevin McGlauchlen • Catherine Menick • Kate Mertz • Jennifer Moline • Doug Moore • Jesenia Morales • Kathy Morneau • Phyllis Mostrom • Xiong Moua • Missy Mound • Liz Murray • Robyn Murray • Jim Myott • Dev Nambudiripad • Caroline Nealon • James Neild • Kevin Nelson • Melody Ng • Hoang Anh Ngo • Ngan Nguyen • Mark Nolen • Dale Nordquist • Jody Norling • Sarah Oberlander • Bill Oberreit • Claire O'Connor • Lisa Olberg • J.T. Oliver • Dave Olsen • Jonmari Olsen • Deb Olson • Reid Olson • Jenny Olson-Cole • Kathy Onken • Mariana Ovtcharova • Carissa Ozangar • Camila Pacheco-Fores • Christine Page • Valli Palanisami • Andrea Pallavicini • Cynthia Pando • Mark Panger • Rosa Pedersen • Scott Plewka • Nancy Pliego • Jim Pogue • Any Porter • Jake Potratz • Chris Pricco • Michelle Prindl • Rachel Provence • Julia Quanrud • Kindre Radloff • Liz Raimann • Orissa Ramnarine • Delores Ratliff • Sue Reese • Judy Rehak • Justin Reichle • Emily Resseger • Sarah Rey • Ryan Rich • Regina Rippel • Dina Rivkin • Carrie Roach • Rebecca Robinson • Emily Roder • Les Rogers • Mig Rogers • Diane Rosenwald • Dave Rosewall • Linda Ruecker • Flossie Russ • Karen Ryan • Jamie Rybak • Brianna Sadler • Jim Sauder • Ethan Schachtman • John Schaefer • Bob Schafer • Maria Schellpfeffer • Ed Schepers • Jacqueline Schmitt • Melanie Schuler • Ricci Seguban • Ben Sherrard • Deb Sherrer • Brian Shields • Caitlin Shrestha • Doug Silge • Linda Silver • Sharon Sims • Nawang Singhe • Charles Sislo • Stephanie Skarolid • Rebecca Sluss • Stella Smith • Steve Smith • Susan Sochacki • Julie Sonier • Wendy Sosa • Michael Splendore • Jon Spoerri • Foster Stangel • John Stefany • Steven Stensvad • Megan Stepaniak • Roger Stoick • Chandra Stone • Dara Stone • Brady Stoner • Brian Strittmater • Joni Strozyk • Annie Swalve • Erica Tande • Chang Thao • Mary Thomas • Nancy Tibbetts Boler • Michael Tierney • Paige Tighe • Tom Timmons • Chip Treen • Daniel Trupin • Paul Tsai • Anna Turnquist • Carol Tveite • Mike Tveite • Lynn Vara • Sonia Vega • Luke Vickers • Rich Vignes • Alex Vollmer • Bob Ward • Reggie Wardoku • Laine Warwick • Eric Watland • Ellery Wealot • Anika Weiberg • Bill Welke • Jessie Welton • Paige Wendland • Bill Werb • David Westlund • Andy Whitman • Anja Wiesner • Steve Willett • Anna Williams • Chris Wittich • Barb Woodruff • Mary Jo Woolf • John Wottrich • Matt Wright • Adam Wrucke • Pa Yang • Linnea Yeazel • Kevin Yee • Danny Ying • Michael Young • Yi Yu • Kelly Zech • Kylie Zimdars • Justina Zukauskaite • Mary Zweber

FUNDERS

January 1, 2021 - December 31, 2022

\$100,000+

Anonymous • Internal Revenue Service- Volunteer Income Tax Assistance Program • JPMorgan Chase Foundation • McKnight Foundation • Minnesota Department of Commerce • Minnesota Department of Revenue • Northwest Area Foundation • Otto Bremer Trust

\$50,000 - \$99,999

EITC Funders Network • Greater Twin Cities United Way • Intuit Financial Freedom Foundation • Target Foundation • Thrivent Foundation

\$25,000 - \$49,000

Allianz Life Insurance Company of North America • Anonymous • Ameriprise Financial • Capital One • F.R. Bigelow Foundation • Minnesota Society of Certified Public Accountants • Wells Fargo Foundation

\$10,000 - \$24,999

Foundation for Financial Planning • Huntington Bank • Land O'Lakes • McNeely Foundation • Securian Financial Group • The Richard M. Schulze Family Foundation • U.S. Bank

\$5,000 - \$9,999

amy and chip Pearson Family Foundation • Gilligan Foundation • KPMG, LLC • RBC Wealth Management • Saint Thomas University • The Jaye F. And Betty F. Dyer Foundation

Up to \$4,999

Abdo • Allodium Investment Consultants • Amazon Smile Foundation • Anonymous • Advisors Group, Inc. • AgriBank • Bremer Bank • Faith United Methodist Church • Fredrikson & Byron Foundation • Forest Lake Lions Club • Nokomis Heights Lutheran Church • Old National Bank • Parametric Portfolio Associates, LLC • Saint Paul Chamber of Commerce • Tax Executives Institute, Inc. Minnesota Chapter • Wellington Management, Inc.

In-Kind Donations

Café Latte • Nicole Colson • Hello Hair Collective • Emily + Ryan Kjesbo-Johnson • KPMG, LLC • Matt Lorenz • Kara McGuire • Minnesota State Fair • Minnesota Vikings • Jerry Morris • M.Kathleen Murphy • Nixta: Tortilleria • Saint Paul Saints • Linda Severson • Stages Theatre • Brian Strittmater • The Bakken Museum • Ron Zweber + Zweber Farms

Matching Donations

3M Foundation • Adobe • Allina Health • Ameriprise Financial • Andersen Corporate Foundation • Best Buy Co., Inc. • Boeing • Boston Scientific • Cargill • C.H. Robinson • Deluxe Corporation Foundation • Eckberg Lammers, PC • ECMC Group • Ecolab • Entegris • Gartner • General Mills • Greater Horizon • JPMorgan Chase Foundation • Land O'Lakes • Medtronic, Inc. • Microsoft • Nike, Inc. • NorthRock Partners • Piper Sandler Companies • RBC Wealth Management • Securian Financial Group • Target Foundation • Thomson Reuters • Thrivent • UnitedHealth Group • United Natural Foods • U.S. Bank • Wells Fargo Bank • Wells Fargo Foundation Minnesota • Xcel Energy Foundation

In 2021 + 2022, donors and volunteers requested and secured \$57,253 in matching contributions from their employers.

2022 Board of Directors

Brian Strittmater, *President*
Cargill

Jeremie Greer, *Vice President*
Liberation in a Generation

Neera Chatterjee, *Secretary*
USBank

Matt Lorenz, *Treasurer*
KPMG, LLP

Dr. Ronda Chakolis
Prime Therapeutics

Beth Haney
Avenues for Youth

Kara McGuire
Gartner

Emma Molls
University of Minnesota Libraries

Jerry Morris
Retired

Desmond Nation
Mayo Clinic

Mark D Nolen
NATH Companies

Marsha Pitts-Phillips
MRPP & Associates Communications, LLC

Elizabeth White
J.P. Morgan Chase

*And thank you to Greg Pesky + Ron Zweber
who completed their board service this year.*

2022 Seasonal Staff

Jill Andersen
Andrea Anderson
Rebecca Bedner
Grey Doolin
Patrick Evans
Aleathea Garry
Jonathan Gaw

Zakya Gazey
Andrew Gillund
Brenda Grove
Sophia Hill
Allison Hofstedt
Lasheena Jackson
Andrea Kessler

Shantel King
Tracy King
Susan Kirkland
Riley McGinnity
Nathan Moore
Donald Muske
Delores Ratliff

Vivian Siafah
Marketa Smith
Daemeon Stanton
Ezra Stillman
Cindy Valensuela
La Vang
Amanda West

2022 Staff Members

Suyapa Miranda, Executive Director
Carla Gainey, Deputy Director
Claudia Holt, Programs + Strategy Director

Tax + Financial Services Department

Alejandro Valenzuela, Jr., Tax + Financial Services Director
Willie Gregg, Tax + Financial Services Manager
Kate Haigh, Tax + Financial Services Manager
Patrick Evans, Special Tax Programs Manager
Carol Thompson, Tax + Financial Services Coordinator
*Thomas Larson, Self-Employment Tax Manager**

Financial Capability + Learning Department

Lenore Curry, Economic Inclusion Manager
Sarah Batz, Financial Empowerment Manager
Katy Schultz, Training + Learning Manager
Mia Krohn, Financial Inclusion Coordinator
Cieritta Natee, FAIR + Money Mentors Coordinator
*Anne Leland Clark, Financial Capability + Learning Director**
*Kim Hover, Financial Inclusion Manager**

Organizational Capacity Department

Ryan Kjesbo-Johnson, Operations Director
Anel Mendoza, Customer Service Manager
Margarita Sanchez, Customer Service Coordinator
Sara McCracken, Volunteer Resources Manager
Mary Kimball, Volunteer Resources Coordinator
*Nicole Laumer, Volunteer Resources Manager**

Development Department

Deena Anders, Development Director
Afton Benson, Relationship Manager

Communications + Engagement

M. Kathleen Murphy, Communications + Engagement Director
Priscila Rockwood, Engagement Manager
*David Langley, Engagement Manager**

**denotes staff who left P+P during 2022*