Asset Builders’ mission is to promote financial education and wealth-building strategies to enhance the quality of life of low-income youth, families, and communities. Our business address is 1213 North Sherman Avenue #195, Madison WI 53704. Please visit www.assetbuilders.org and www.ficbonline.org to learn more about us, and call Richard Entenmann, Executive Director, at (608) 663 6332 for more information.

1. Description of our activities. In 2012, we conducted the following programs.

   a. Money Conference

      i. Description. Full-day direct education event for the community. The Conference includes programming for adults and children with age-appropriate content.

      ii. We taught 975 individuals through this program, plus volunteers. This is a significant increase from 700 individuals taught in 2011!

      iii. Conference Locations: Wausau; Milwaukee; Madison; Fox Cities; and Racine/Kenosha.

      iv. We achieved record attendance for the Wausau Conference in 2012, successfully changing the date from October to January.

      v. We started work on a first-ever Oshkosh Conference, which we then conducted successfully in 2013.

   b. Finance and Investment Challenge Bowl (“FICB”)

      i. Description. Personal finance “college bowl” tournament where teams of students compete. At the FICB, students demonstrate their knowledge of personal finance and the competition celebrates their achievements.

      ii. We served at least 505 students during the 2011-12 season, conducting a total of seven tournaments. This is a significant increase from 468 students served during the previous season.

      iii. Locations: Wausau; Racine/Kenosha; Madison; Milwaukee; Fox Cities; Menominee Indian Reservation; and state championship tournament.

   c. Personal Responsibility and Education Program (PREP)

      i. Description. PREP is a direct education program for middle school and high school students, following the Money Conference format of general sessions
and classroom workshops. PREP also features a train-the-trainer component for staff of participating community-service organizations.

ii. We taught at least 600 students and 25 staff members during 2012.

iii. Partners: AIDS Resource Center of Wisconsin; Center for Self-Sufficiency; Silver Spring Neighborhood Center; Neighborhood House; and Medical College of Wisconsin (all in Milwaukee); YMCA of Racine; Rock County Community Action.

d. Youth POWER Academy of Finance

i. Description. Two-week personal finance “boot camp” featuring college readiness and personal finance instruction.

ii. Participation was 19 students.

iii. Location: Edgewood College in Madison.

e. Millionaires Clubs

i. Description. Semester-long after school or weekend program for middle school and high school students, with instruction on personal finance basics and human capital development.

ii. Participation was approximately 20 students.

iii. Locations: Dane County Neighborhood Improvement Program; Madison City-wide Club.

2. 2012 Board of Directors

a. Pam Anderson, US Bank
b. Susan Bulgrin, Culvers Restaurants
c. Richard Entenmann, Asset Builders
d. Annette Miller, MGE
e. Thelma Sias, We-Energies
f. Robert Wynn, Akamai, LLC
g. Aaron Zitzelsberger, UW Foundation
h. Jim Drogue, WI Credit Union League.

3. 2012 Staff. Richard Entenmann, Executive Director, was a full-time employee and Jeff Sroka, Program Director, was a part-time employee. We work with many consultants and independent contractors to minimize staffing expense.

4. Financial documents. IRS Form 990 has been filed for 2012 and is a matter of public record.

5. Assurance that copies of the most recent annual report are available to the public. This annual report is available on the Asset Builders website: www.assetbuilders.org.