



2023

Governor's Financial Literacy Award Recipients

Awards Recognize Individuals & Organizations for Elevating the Financial Literacy, Capability, and Financial Inclusion of Wisconsin's Residents

Individual Category

Kelly R. Behnke, WEA Member Benefits, Madison

Kelly Behnke works for WEA Member Benefits and provides informative videos and other resources on financial literacy topics for school staff. Resources put together by Kelly have been shared with hundreds of educators and support staff and personnel. As an example of the success of her work the Iola-Scandinavia School District has 84% of active staff participating in its 403(b) plan, with 152 total participants with an average balance of \$55,080.

Shelina A. Harvey, Wisconsin Women's Business Initiative Corporation, Milwaukee

Shelina Harvey is a certified financial health coach and a Wisconsin-licensed real estate agent. She combines both areas of expertise to offer a holistic approach to financial counseling, addressing clients' basic financial wellness needs, as well as providing a comprehensive understanding of the homeownership journey. In her role, Shelina was instrumental in training 284 adult graduates of the "Make Your Money Talk Bootcamp." She has also facilitated the opening of 121 match savings accounts.

David D. Mancl, Wisconsin Department of Financial Institutions, Madison

David Mancl is the director of the Office of Financial Literacy at the Wisconsin Department of Financial Institutions. He has over 20 years of experience in the financial literacy and capability field. David's pioneering work in advocating and supporting financial literacy in schools, workplaces, and communities was instrumental in creating a high school personal finance requirement, the "ELEAVTE Wisconsin[®]" workplace initiative, and the "Money Smart Wisconsin" awareness and educational campaign impacting thousands of Wisconsin residents.

Evan R. Schmidt, Shorewood High School, Shorewood

Evan Schmidt, a social studies teacher at Shorewood High School, has pioneered pre-collegiate studies with financial literacy education. Hundreds of students go through his curriculum each

year, including an investment club he created with over 90 members. He also gives students the opportunity to compete in online and regional, in-person finance and economics competitions. He inspires students and teachers every single day, and interest in financial literacy has grown astronomically thanks to Evan's hard work creating these opportunities for students.

Palmer B. Schroeder, Reedsburg Area High School, Reedsburg

Palmer Schroeder has taught personal finance for seven years as a high school educator and is in his second year at Reedsburg Area High School. Over the last two years, he has implemented several innovative practices in his personal finance classes, including seeking partnerships with the local business community to help educate and guide the program's direction, and in-class strategies that demonstrate measurable results and implementation of experiential learning. Palmer has also received the "Distinguished Educator Award" from Next Gen Personal Finance.

Organization Category

Asset Builders, Madison

Asset Builders is a non-profit organization that has been teaching financial capability and economic empowerment to low and moderate-income youth and families since 1999. Along with dozens of instructors, hundreds of volunteers, and numerous sponsors and donors, Asset Builders has spent the last two decades empowering communities through education and financial literacy having taught over 20,000 individuals and counting. By participating, low to moderate income youths grow up to learn that they can lead financially healthy lives.

CreditGuyMKE Financial Solutions, Milwaukee

CreditGuyMKE, led by Dr. Lamont Smith, has demonstrated innovation by transitioning from credit repair to credit education in the past two years. The initial change in their program model was piloted in collaboration with the Wisconsin Women's Business Initiative's "Black Business Boost" program, which has conducted hundreds of personalized one-on-one business coaching sessions and group educational trainings for participants. The program emphasizes long-term financial empowerment through knowledge that can be transferred from generation-to-generation.

Educators Credit Union, Mount Pleasant

The Educators Credit Union "Youth Apprenticeship" program supports hands-on financial literacy by hiring students to work in one of five high school Educators Credit Union branches. At these student-run branches, students and teachers have direct access to open an account, make withdrawals and deposits, and use the onsite ATM. Students participating in the "Youth Apprenticeship" program learn how a financial cooperative works and is structured, while gaining professional skills, financial knowledge, and earning an income. All student participants have opened a checking and savings account, and about 70% of students are offered full-time or part-time positions at the credit union.

Fort Community Credit Union, Fort Atkinson

Fort Community Credit Union has demonstrated a longstanding commitment to promoting financial knowledge, capability, and inclusion within the communities it serves. In the past year, Fort Community Credit Union has focused on fraud prevention in the senior community, financial education for youth and the homeless, financial inclusion for Hispanic members, and products that encourage saving. As a result, over 1,700 individuals were impacted and there was an increase of 498.40% in specialized accounts that encourage emergency savings and automated savings.

Hmong American Peace Academy, Milwaukee

The Hmong American Peace Academy offers three financial education programs to their students, including “Money Sense,” “Money Path,” and “Money Coach.” This has been done through a partnership with SecureFutures for the last 13 years. As a result, financial literacy increased through one-on-one and group mentorship, and students were given the tools needed to determine their future post-graduation and into adulthood. Since 2010, the Hmong American Peace Academy has made it possible for 1,356 students to participate in SecureFutures programs.

Royal Credit Union, Eau Claire

Royal Credit Union created “Go Big or Go Broke[®],” a life-sized financial education board game to deliver exciting interactive financial education to young adults aged 17 to 22. This tool was designed to reach young adults and others where they are – on college campuses, at high school events, and at state fairs – to provide a fun way to learn financial independence. Since late 2021, Royal Credit Union has hosted 16 “Go Big or Go Broke[®]” events with over 927 participants.

WESTconsin Credit Union, Menomonie

WESTconsin Credit Union places a high priority on financial literacy and aligns its resources with numerous programs to promote financial education within the communities WESTconsin serves. Over 47,000 students and adults have been impacted over the past year. WESTconsin does this through its partnership with Banzai, which offers an interactive education platform, Mad City Money, which offers real life financial simulations, and the Finance and Investment Challenge Bowl, which is a financial literacy competition for high school students.

Legacy Category

The legacy award is given to an organization, business, or individual whose purpose and heritage is ingrained in sustained financial literacy and capability efforts, and whose reputation in doing so is held in high regard in serving as a model for others in carrying on the work of supporting financial literacy and expanding opportunities through financial capability and financial inclusion. This lifetime recognition is intended to be conferred only once to recipients.

Jill J. Hughes, retired teacher, Menomonee Falls High School, Menomonee Falls

Jill Hughes taught personal finance and related classes throughout her 30-year career as a teacher at Menomonee Falls High School. She helped generations of students become more financially literate, giving them the knowledge they need both to make better short-term financial decisions and to achieve substantially higher net worth in the long-term. During her career, Jill started the “Reality Check” program and a “School Store,” she was a long-term participant in the Finance and Investment Challenge Bowl, and she was instrumental in guaranteeing that all Menomonee Falls students received a one-semester personal finance course before graduating.

Ladysmith Federal Savings & Loan, Ladysmith

Ladysmith Federal Savings & Loan is the only locally owned community bank in Rusk County, Wisconsin. Ladysmith Federal is innovative in leading financial literacy in the local community by utilizing national and statewide programs and customizing programs for smaller audiences. Ladysmith Federal has led efforts in its community since 2006. During this past school year, its efforts have impacted over 565 individuals, including financial literacy initiatives that have resulted in students banking with Ladysmith Federal, growing into teens, and becoming young adults who are managing their own finances through Ladysmith Federal Savings & Loan.

Peggy M. Olive, retired, UW-Extension, Richland County

Peggy Olive worked for the University of Wisconsin-Extension as an extension educator, specializing in personal finance education for the communities of Richland County. In this role, she served the people in Southwest Wisconsin with financial education classes and coaching. She was also a leader in statewide UW-Extension work to professionalize financial education, as she sought best practices and innovations. In doing so, she influenced financial education work in all 72 counties of the state. It is safe to say that over her 26-year career, at least 10,000 people were directly educated by Peggy’s personal finance training and coaching.

WEA Member Benefits, Madison

WEA Member Benefits has been helping Pre-K through 12th grade Wisconsin public school employees and their families achieve their financial goals since 1972. Its ongoing commitment to enhancing the financial lives of Wisconsin public school employees includes the creation of financial literacy games “Don’t Be Jack™” for adult learners, and a student version of “Don’t Be Jack™” for the classroom. Over 400 statewide financial webinars have been presented to nearly 10,000 educators since 2021. WEA Member Benefits also collaborates with the “ELEVATE Wisconsin®” initiative’s public-private cooperative to provide unbiased financial education to Wisconsin residents.