

JONATHAN D ROSEN FAMILY FOUNDATION

December 2018

ANNUAL REPORT



JDRTM
FAMILY FOUNDATION

LETTER FROM THE EXECUTIVE DIRECTOR

Dear Friends,

After six years of dedication to changing the financial futures of children and teens in the southeast, the Wealthy Habits program continues to grow and flourish. This year marked 5000 total students for the organization. I am incredibly grateful for all of our supporters who have each played a part in this great achievement.

Throughout the years, our dedicated staff and interns have done an amazing job influencing the financial future of our students. By focusing on teaching students not only the “how,” but more importantly, the “why” of financial literacy, our programs change the mindset, and ultimately, the future of our students.

I often receive feedback from parents explaining their child's newfound desire to open savings and investment accounts. Students are even asking parents about their family's financial decisions – becoming active participants in the financial process.

Providing these life-changing programs would not be possible without you, our continually expanding community of volunteers, dedicated Board of Trustees, and generous donors. Together, we are truly able to make a difference in our students’ lives and attack financial illiteracy.

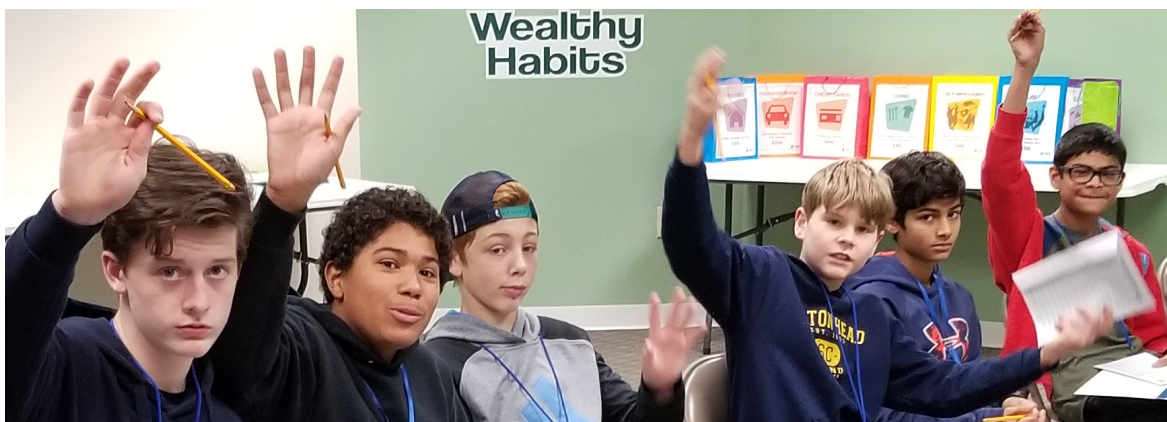
Thank you for your commitment,



Executive Director



ABOUT US



PROVIDING PROGRAMS THAT WORK

The Jonathan D. Rosen Family Foundation developed the Wealthy Habits program in 2012 to educate students ages 11-19 about personal finance. Through the years, the organization has grown its programs and its impact. So far...

5812 students were provided the tools necessary to make better financial decisions

301 programs facilitated throughout the southeast

61,344 instructional hours provided to students

261 students awarded a \$50 deposit into an investment account

2018 Highlights:

- Facilitated a total of 80 programs with 42 of those programs being 5-day camps
- Development of additional subject focused camp options to encourage returning students
- A total of 10,768 instructional hours were delivered to students

OUR MISSION:

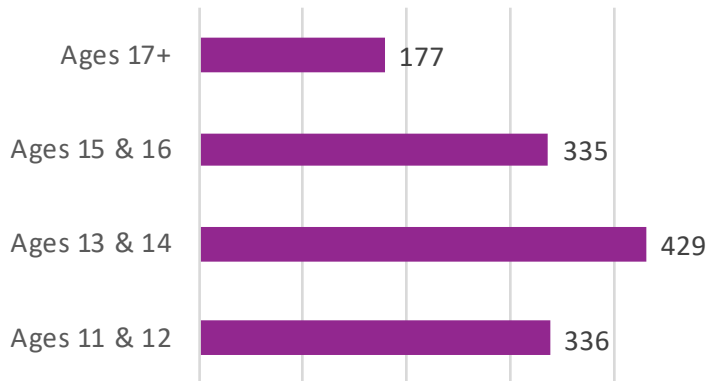
To empower children and adults across the socioeconomic spectrum with the knowledge and skills essential for successful financial decision making.



2018 STUDENT STATISTICS

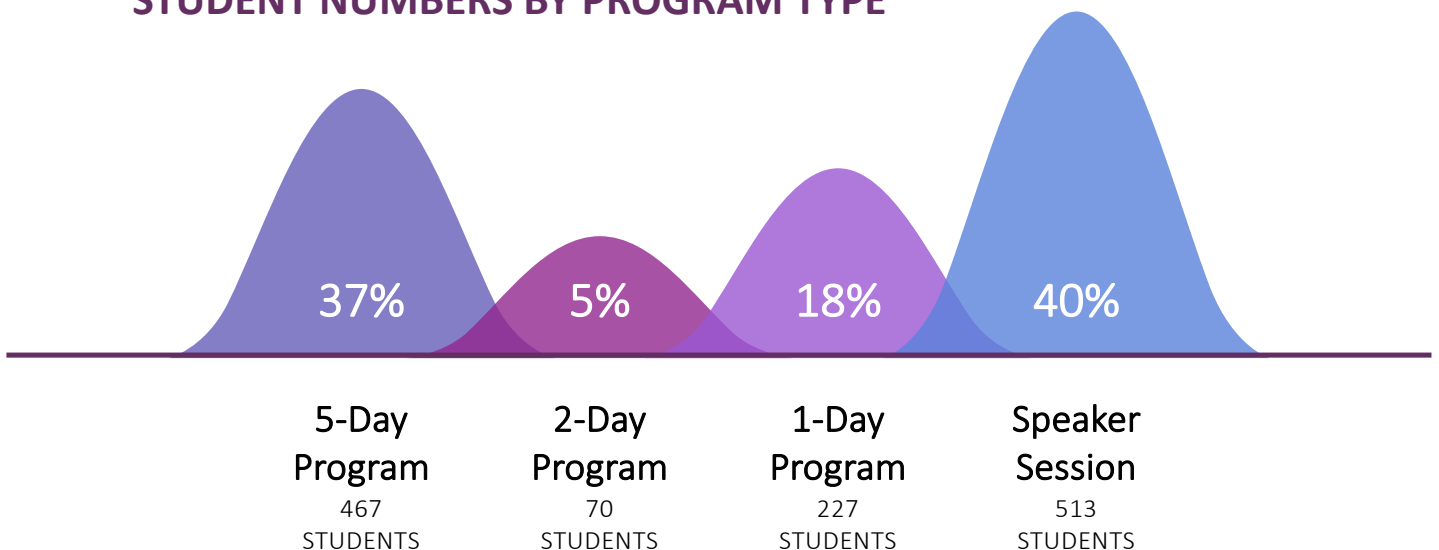


STUDENT NUMBERS BY AGE GROUP



The Wealthy Habits curriculum is relevant and fun while providing the skills and knowledge needed for future financial success.

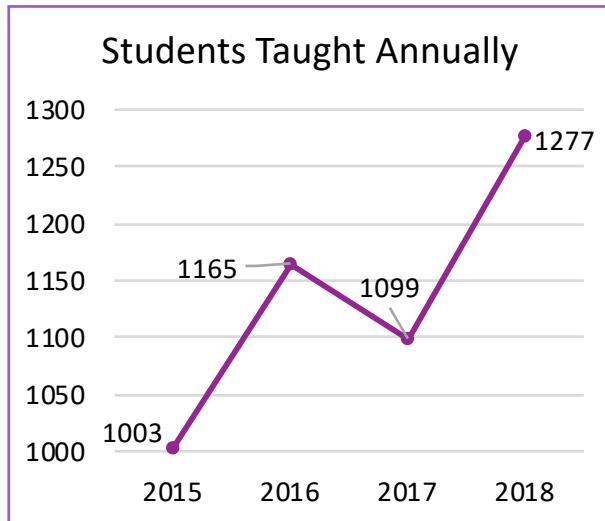
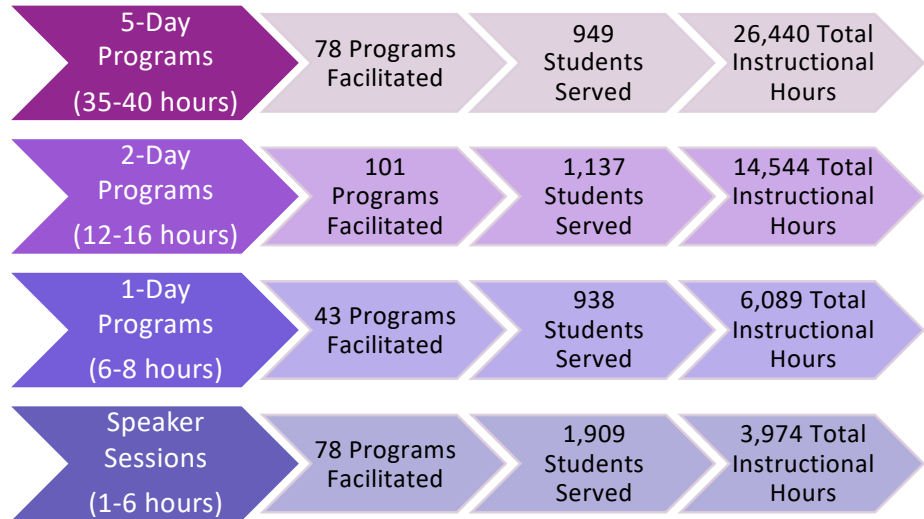
STUDENT NUMBERS BY PROGRAM TYPE



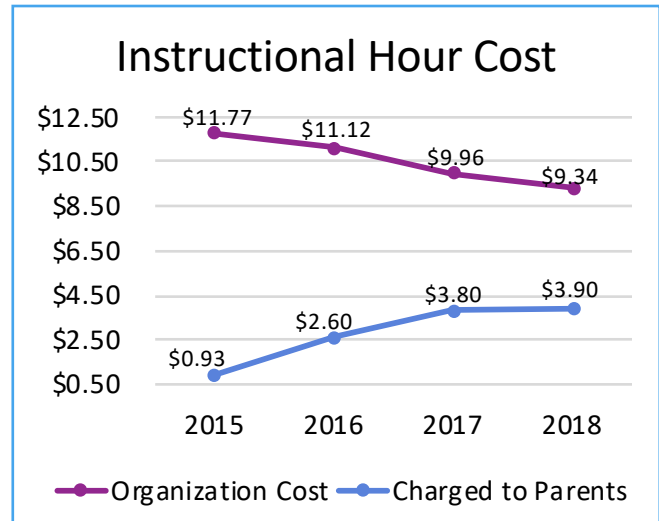
1277 STUDENTS IMPACTED
IN 2018

TOTAL INSTRUCTIONAL IMPACT FOR 2012-2018

Lengthier program options provide a more complete education while shorter options allow engagement with students that might otherwise receive no education at all and drive attendance to lengthier programs.



Our increase in numbers has never diminished our focus on the quality of the curriculum. The increased student feedback has improved our delivery.



Varying program lengths allow the organization to provide the Wealthy Habits curriculum to even more students and drive a 23% re-engagement rate.

WHAT WE DO WORKS

STUDENT SUCCESS FROM THE VIEWPOINT OF PARENTS



“This camp was wonderful! I was delighted at what my daughter learned - and, as a 13-year-old who is difficult to please regarding activities, she said that it was SUPER fun! I was really happy that the counselors and curriculum planners made it fun. I also really liked the summary of what they did each day and mention of different campers. She did not tell me much, so that helped a lot. I also liked the outline of the curriculum. I will recommend this camp to our friends.” - July 29, 2018

“Great program. My kid talked each day about what he learned and asked me questions about our finances and sometimes challenged me on what could be done better. He made friends and had fun as well.” - June 16, 2018

“This camp was great. My son participated in this week-long camp and really enjoyed it. He definitely wants to go back next year, and was even talking about being a counselor in the future. I think this is such valuable information that you are teaching kids. I have passed on the training for teachers information for teachers at my kids' school. I hope they participate.” - July 28, 2018

“My son did not want to attend this camp, but I think he really enjoyed it. He learned so much and came home each day excited to tell us what he learned. I am pretty sure that he understands and knows more about finances than my 46 year-old self. I highly recommend this camp! If your camp is still around in three years, we will send our daughter! Thank you!!! My husband thanks you too!” - June 18, 2018

“Thank you so much, My son thoroughly enjoyed the camp. You guys did an amazing job! Well done & we hope to see you next year.” - July 13, 2018

COLLEGE INTERN IMPACT

Each year the organization provides life-changing experiences to not only the students who go through our programs but also to the promising undergraduates that teach them. To date, the organization has afforded this unique opportunity to 27 college students from across the nation.

Ashley Miller's Story

As a junior studying Finance at the University of Louisiana at Lafayette, Ashley Miller's strong passion for changing the world made her a strong candidate for the internship. During her interview, she explained that one of her life goals is to start a nonprofit that serves low-income neighborhoods by providing them with the financial knowledge she was gaining through her education. While she was already excited to contribute, her experience was much more than she expected.



“What the organization is doing can honestly be described as 'changing lives,' and I'm happy to have had a hand in this experience. Even more, on top of the financial skills I learned this summer, I learned more about myself and the world around me. When you are in the classrooms, you see just how different everyone truly is. From working with instructors from New York and California to teaching students from Atlanta and Maryland, I was exposed to so many different lifestyles and attitudes. By the end of the summer, I honestly felt like I'd learned more about society and the world as a whole. I also learned what it feels like to take charge of a classroom and be the one that everyone is looking up to.

Going into the summer, I probably would've described myself as a bit timid, but that is definitely gone now. Teaching with Wealthy Habits was truly an eye-opening experience. I look forward to doing even more with the organization in the future.”



Ms. Miller graduates with her BS in Finance in December of 2018 and will be joining our team next year as the Program Coordinator.

2018 FINANCIALS: Driving Efficiency

Direct Program Expenses
91.45%

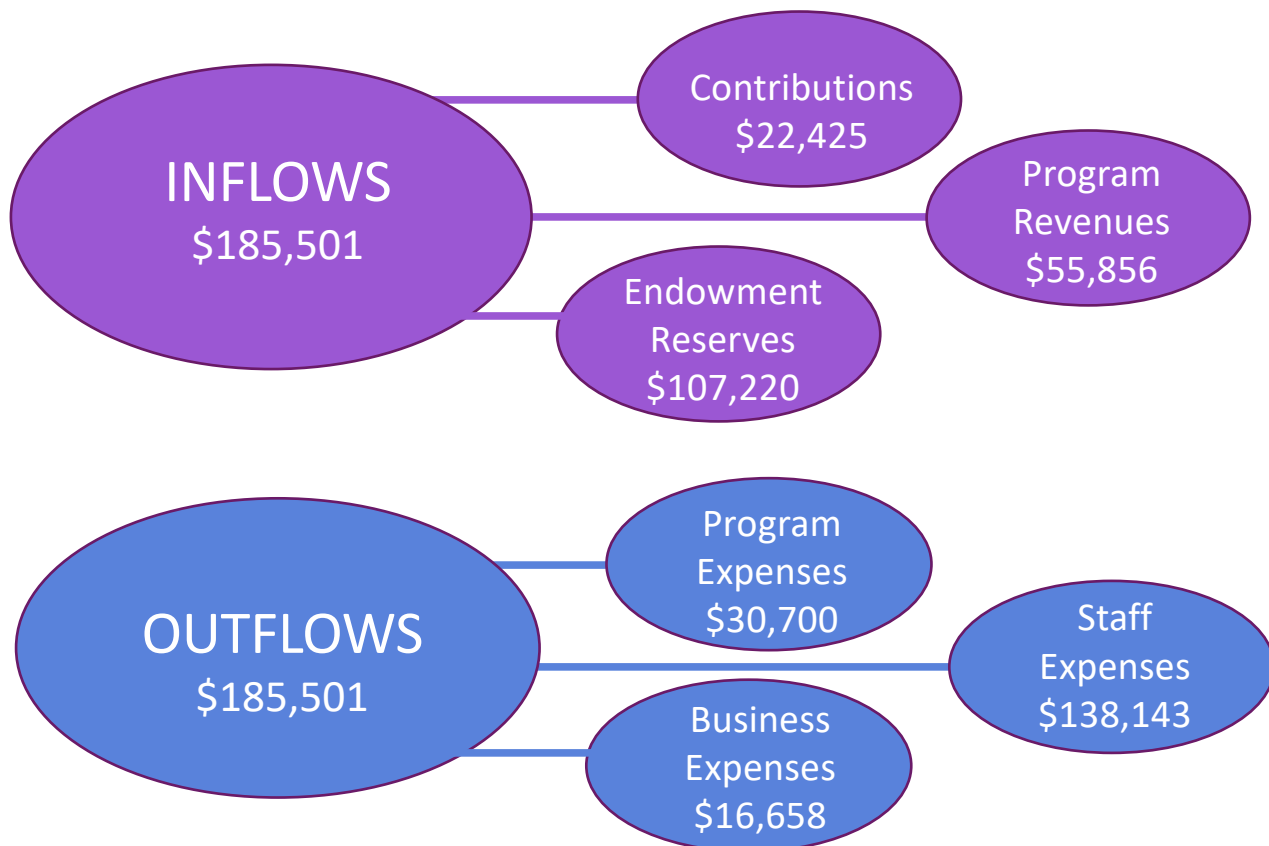
Indirect (Business) Expenses
8.55%

Expenses Covered by Program Fees
33.08%

- Direct program expenses are those used to directly fund the facilitation of programs. Indirect expenses are those that are needed to have a functioning organization.
- Keeping the cost to parents low and providing program scholarships to those in need allows for more students to be provided with the Wealthy Habits program.

Program Cost to Parents
\$3/Instruction Hour

Program Cost to the Organization
\$10/Instruction Hour



A SPECIAL THANKS TO OUR 2018 DONORS AND SPONSORS

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Ken & Debbie Merten

Ginger Gallagher & Barry Gilbert

James Miller

Andy Trotti

Vela Agency

Keller Knapp Realty

David Hauser

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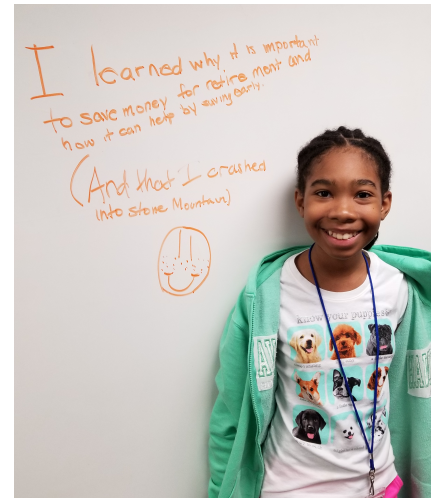


DONATE - MAKE A DIFFERENCE

When you donate to Wealthy Habits, even a small gift makes a large difference. A \$10 donation provides one student with the otherwise impossible opportunity to learn about personal finance and financial freedom.

Consider a monthly donations as they allow the organization to plan for new initiatives and reach a wider spread of students. Every dollar counts.

*Donation to the Jonathan D. Rosen Family Foundation are tax-deductible.



Donation By Check

Donor Information (please print or type)

Name: _____
Billing Address: _____
City, State, Zip: _____
Phone: _____
Email: _____
Pledge Amount: _____

Make checks payable to the **Rosen Family Foundation** and mail to:

Jonathan D Rosen Family Foundation
1200 Ashwood Parkway, Suite 155
Atlanta, GA 30338

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Legacy Planning or Other Type of Donation?

Contact Tracy Tanner:

678-218-1299

tracy.tanner@rosenfoundation.org

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VOLUNTEER OPPORTUNITIES

Volunteers are a great asset to any organization. Both professional and non-professional services are critical to our continued success. We rely heavily on in-kind donations of both products and services to make our programs a reality. If you have a specialty or strong connections in your community, school or youth groups, we would be grateful to have your help.

Let's Make A Greater Impact Together

Visit our website for more information or call us at 678-218-1299.

<https://wealthyhabits.org/volunteer/>