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November 1, 2019

Mr. Antonio M. Perez  
Executive Director  
Housing Authority, City of Milwaukee  
809 North Broadway  
Milwaukee, WI 53202

Dear Mr. Perez,

Enclosed, please find the WWBIC Make Your Money Talk/Match Savings Account quarterly program report for the period July 1, 2019 through September 30, 2019.

2019 has been a successful year for assets purchased by HACM residents for a total of 130. Number one asset was debt repayment and then car purchases. The Make Your Money Talk Boot Camp has shown great success as a one-day session works with residents work schedule.

Since the program's inception in 2004, HACM program participants have accomplished the following:

- **158** HACM residents purchased their first home.
- **73** HACM residents created or developed a small business.
- **90** HACM residents invested in their post-secondary education.
- **133** HACM residents paid down or off debt
- **45** HACM residents purchased a vehicle or related vehicle expenses

Thank you again for your continued support of our mission. We look forward to a successful 2019! If you have any questions or if we can provide additional information, please do not hesitate to contact Alia Carroll at (414) 395-4545 or via email at [acarroll@wwbic.com](mailto:acarroll@wwbic.com).

Sincerely,

Alia Carroll  
Program Director

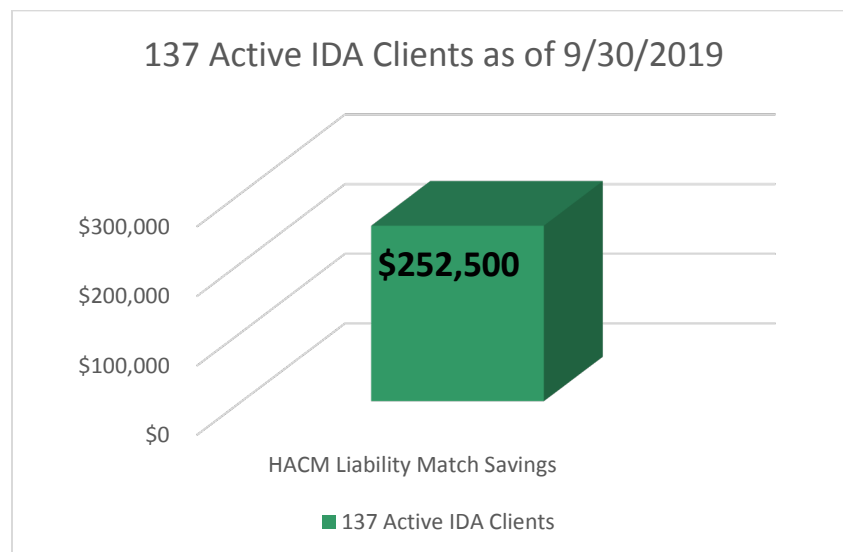
Shelina Harvey  
Financial Coach

cc: Ms. Bobbi Marsells  
Mr. Kenneth Barbeau  
Ms. Maria Rodríguez  
Mr. Willie Hines  
Ms. Amy Hall

# ***Make Your Money Talk and Match Savings Accounts*** **Program Dashboard Report** **Housing Authority of the City of Milwaukee**

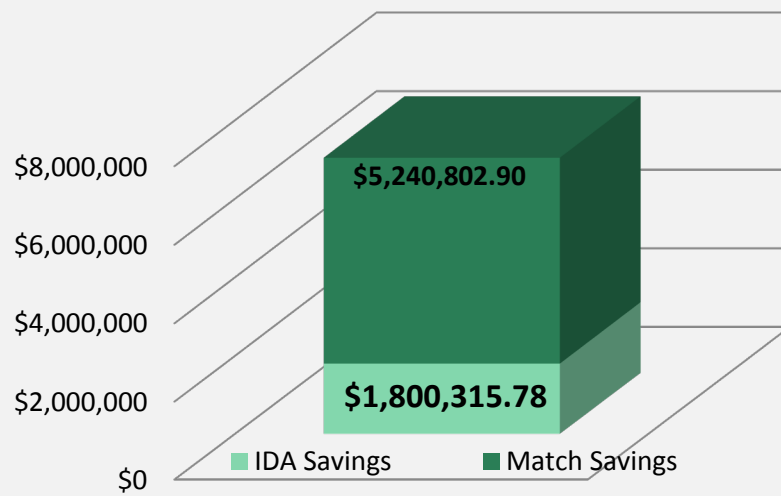
Program Activity Since 2004	
2,609	<i>Make Your Money Talk Graduates</i>
1,218	<i>Match Accounts Opened</i>
499	<i>Assets Acquired</i>

## **Cumulative Asset Acquired**



- Active clients as of 9/30/2019
- Assume a 10% drop off rate due to not being able to save or losing interest in program
- This does not include any additional accounts being open for the remaining of the year

## IDA & Match Savings 2004 to Current



***Make Your Money Talk Series***

<b>2019 Make Your Money Talk Deliverables</b>					
<b>Deliverable</b>	<b>Quarter 1</b>	<b>Quarter 2</b>	<b>Quarter 3</b>	<b>Quarter 4</b>	<b>Totals</b>
MYMT sessions	2	1	2		
MYMT attendees	64	61	116		
MYMT graduates	64	61	116		

***Match Savings Accounts***

<b>2019 Individual Development Account Deliverables</b>					
<b>Deliverable</b>	<b>Quarter 1</b>	<b>Quarter 2</b>	<b>Quarter 3</b>	<b>Quarter 4</b>	<b>Totals</b>
Match Accounts opened	36	36	33		
Amount saved	\$57,725.00	\$52,000	\$50,324		
Combined savings and anticipated HACM match	\$282,000	\$204,000	\$252,500		
<b>Total assets purchased</b>	40	49	41		
Homes purchased	2	4	2		
Businesses started	1	2	1		
Post-secondary education	2	3	1		
Pay Down Debt	30	31	30		
Purchase Vehicle	5	9	7		