



Greater Milwaukee
1533 N. RiverCenter Drive
Milwaukee, WI 53212
Phone: 414.263.5450

South Central
2300 S. Park Street, Suite 103
Madison, WI 53713
Phone: 608.257.5450

Southeast
600 52nd Street, Suite 130
Kenosha, WI 53140
Phone: 262.925.2850

245 Main Street, Suite 102
Racine, WI 53403
Phone 262.898.5000

Northeast
1191 N. Casaloma Drive
Appleton, WI 54913
Phone: 920.944.2700

info@wwbic.com
wwbic.com

January 29, 2021

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, 2020 through September 30, 2020.

2020 has been a successful year for assets purchased by HACM residents for a total so far of 46. Number one asset was debt repayment and then home/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:

- **176** HACM residents purchased their first home.
- **76** HACM residents created or developed a small business.
- **97** HACM residents invested in their post-secondary education.
- **244** HACM residents paid down or off debt
- **77** 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 2021! If you have any questions or if we can provide additional information, please do not hesitate to contact Shelina Harvey at (414) 395-4754 or via email at sharvey@wwbic.com.

Sincerely,

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

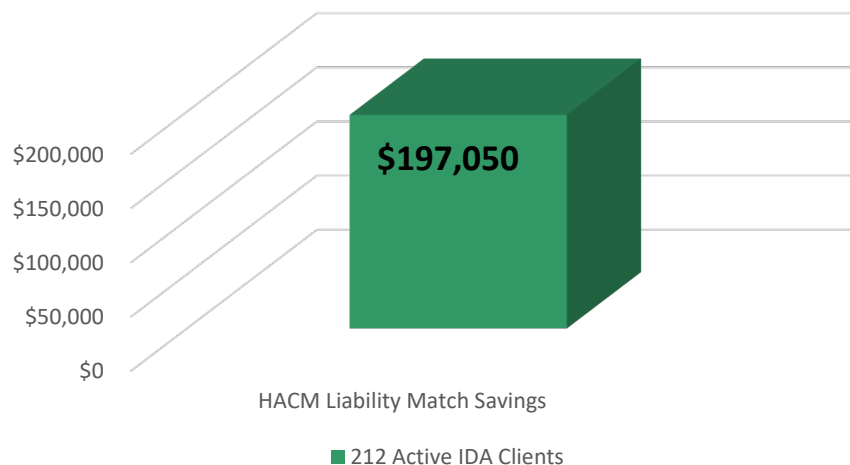
Housing Authority of the City of Milwaukee

Program Activity Since 2004	
2,834	<i>Make Your Money Talk Graduates</i>
1,363	<i>Match Accounts Opened</i>
670	<i>Assets Acquired</i>

Cumulative Asset Acquired

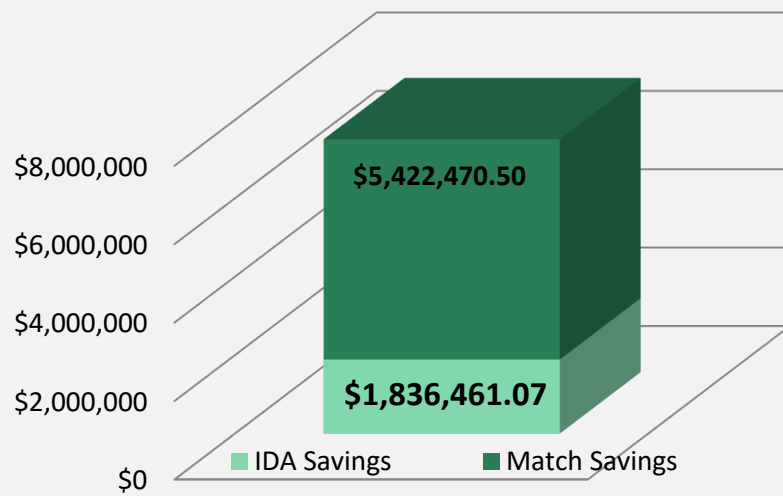


212 Active IDA Clients as of 12/31/2020



- Active clients as of 12/31/2020
- Assume a 39% drop off rate due to COVID and 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

2020 Make Your Money Talk Deliverables					
Deliverable	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Totals
MYMT sessions	1	1	1	2	5
MYMT attendees	29	70	23	66	188
MYMT graduates	29	70	23	66	188

Match Savings Accounts

2020 Individual Development Account Deliverables					
Deliverable	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Totals
Match Accounts opened	35	13	32	29	109
Amount saved	\$40,412.74	\$41,933	\$43,737.99	\$46,907	\$416,947.73
Combined savings and anticipated HACM match	\$167,146.74	\$192,155	\$225,161.90	\$243,957	\$828,420.64
Total assets purchased	41	24	46	18	129
Homes purchased	6	3	2	1	12
Businesses started	1	0	0	1	2
Post-secondary education	3	0	1	0	4
Pay Down Debt	25	14	35	14	88
Purchase Vehicle	6	7	8	2	23