



FIRST COMMAND  
EDUCATIONAL  
FOUNDATION

FINANCIAL READINESS FOR LIFE®

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# 2022 ANNUAL REPORT



# Why We're Proud of 2022!

1. Received Candid's Platinum Seal of Transparency for another consecutive year. This seal is awarded to charities illustrating the highest level of responsible fiscal management and commitment to accountability and transparency.
2. Awarded over \$112,000 in scholarships to more than 80 students.
3. Awarded more than \$5 million in scholarships since 1983.
4. Provided financial education for every military branch (Army, Navy, Marines, Air Force, Space Force, Coast Guard, National Guard, and Reserve Components)
5. Conducted:
  - a) 119 financial education sessions for 2,657 personnel
  - b) 93 presentations to 2465 military members and civilian government employees
  - c) 5 financial presentations to first responders/law enforcement officers
  - d) 4 presentations to the USCG members at Alameda, CA; New Haven, CT; Key West, FL; and USCG Academy in New London, CT.
  - e) 3 financial education sessions tailored specifically for military spouses.
  - f) 2 financial presentations at the FBI National Academy
6. Presented 33 personal financial management sessions to 791 SROTC cadets at multiple universities.
7. Enrolled 10 new instructors in Money Matters Online to assist them in educating teens and young adults on basic financial principles.
8. Conducted 13 FERS employee benefit webinars for nearly 500 federal civilian employees nationwide.
9. Grew 150 new donors who partnered with us to make our cause their own.
10. Supported a growing network of 35+ volunteers who helped with fundraising events.
11. Netted over \$44,000 during our 15<sup>th</sup> Annual "Chip-in" for Education Golf Classic and spring silent auction, benefiting scholarships.
12. Hosted our 2nd annual charity clay shoot, netting almost \$5,000 for financial education programs.
13. Split \$4,680 from the annual Holiday Haul 50/50 Raffle with one lucky winner with proceeds benefiting our general operating fund.



## From the CEO's Desk

As we approach the end of another tremendous year at First Command Educational Foundation, I am extremely proud of our legacy and accomplishments throughout 2022. It's been a journey of growth, resilience, and, most importantly, impact. As we take this opportunity to report our collective achievements, I am inspired by the dedication and passion that each member of our First Command Educational family brought to the table.

### **Community Impact:**

Our mission is at the heart of everything we do. 2022 was a challenging year as we emerged into the new post-COVID period and reestablished relationships to continue the great programs First Command Educational Foundation provides. In 2022, we made tremendous strides toward achieving our goals and paving a path for future growth and expansion! From launching an initiative to accredit the TAKE COMMAND® online education program to securing our first-ever corporate sponsors for our new annual Clay Shoot fundraiser, to growing new college scholarship donations by over \$11,000 the impact of our programs reached across the country, touching the lives of 2,177 members of the military community and their families. We did so through 80 financial readiness seminars and 17 Federal Employees Retirement System classes, and awarding 79 scholarships totaling \$122,000.

### **Collaboration and Partnership:**

None of our achievements would have been possible without the power of collaboration. I want to express my gratitude to our incredible partners, volunteers, and supporters who have stood by our side. We continue to actively seek new partners who are aligned with our mission.

### **Financial Stewardship:**

I am pleased to report that our commitment to financial stewardship has remained unwavering. Through careful management and the support of our generous donors, we have not only sustained our programs but also expanded our reach.

### **Gratitude to Our Supporters:**

To our donors, sponsors, and everyone who has contributed to our cause, thank you for believing in our mission. Your generosity has been the bedrock of our success, and we are deeply grateful for your ongoing support.

### **Expanding Opportunities:**

This year we brought in a new President of First Command Educational Foundation. Mr. Tom Kuhar joined our team in May 2022 and will be focused on the day-to-day business processes and leadership of our great team of employees and volunteers. Tom is a retired Coast Guard Officer with over 24 years of military service and brings a wealth of operational, strategic planning, and leadership experience.

I look forward to another year of collaboration, growth, and making a lasting impact on the lives we touch.

Thank you,

Charles "Skip" Bowen  
*Chairman and Chief Executive Officer, First Command Educational Foundation*



## From the President's Desk

It is both an honor and a privilege to be entrusted with the responsibility of serving as President of the First Command Educational Foundation. I am eager to embark on this journey with the incredible community of supporters that make First Command Educational Foundation what it is.

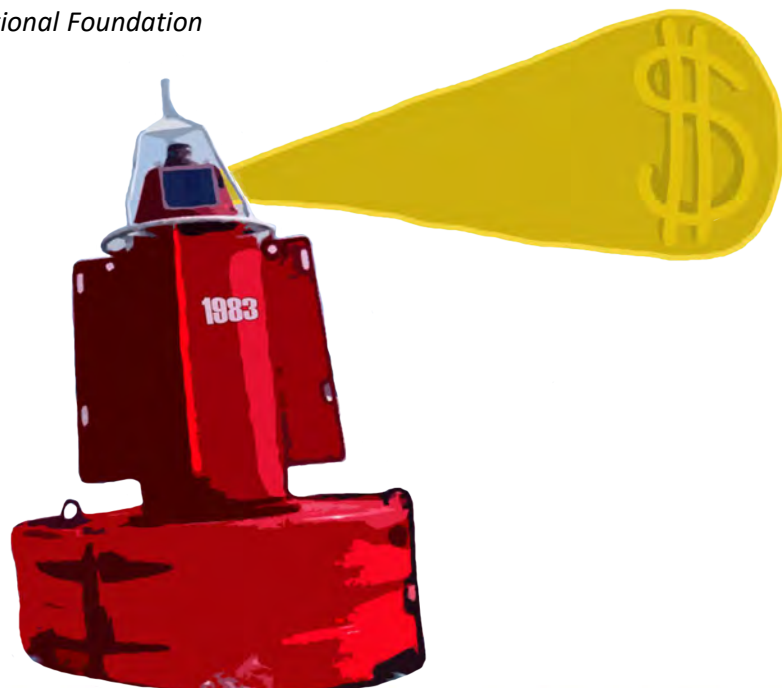
Your commitment to First Command Educational Foundation's mission and vision has been the driving force behind our success, and I am truly inspired by the dedication I've witnessed thus far. My immediate focus is on building upon the strong foundation that has been laid by those who have come before me. I am committed to fostering an environment of collaboration, innovation, and growth. Together, we will continue to expand the reach and impact of our educational programs, TAKE COMMAND, and scholarships. Concurrently, we will continually strive to be more efficient with the precious donations we receive to provide the greatest value we possibly can.

I invite you to join me on this exciting journey. Your input, feedback, and support are invaluable as we navigate the opportunities and challenges that lie ahead. If you have any thoughts or suggestions, please don't hesitate to reach out. Your perspective matters, and I am eager to hear your insights. I am confident that, with your partnership, we will achieve great things together. I am excited for this opportunity to be a part of the promising future of First Command Educational Foundation.

In service,

A handwritten signature in black ink, appearing to read 'Tom Kuhar'.

Tom Kuhar  
*President, First Command Educational Foundation*





# TAKE COMMAND<sup>®</sup>

## *Financial Readiness for Life<sup>®</sup>*

TAKE COMMAND is a comprehensive online financial readiness and resilience program for service members and their families. Our curriculum prepares service members to make well-informed, wise financial decisions at every career and life stage. The objective is to provide the solid foundation they need to effectively pursue and achieve long-term financial security.

### TAKE COMMAND IS:

**CONVENIENT:** Accessible 24/7 on demand via computer, smartphone, or tablet

**ACHIEVABLE:** Lessons can typically be completed in as little as 10 minutes and courses completed in no more than one hour each

**REWARDING:** Accredited for continuing education (pending)

**ECONOMICAL:** Each learner may take unlimited courses at **no cost**



Currently, the TAKE COMMAND program of study consists of 23 comprehensive courses that surpass the 2016 NDAA financial literacy mandates. Each course not only teaches valuable financial information but also allows learners to interact with the lessons. This interaction includes fillable financial worksheets and guidebooks, activities within the lessons, and “Check Your Knowledge” questions to reinforce learning. These interactive modules encourage adopting a mindset of positive financial thoughts and behaviors. In addition to learning financial fundamentals, service members and their families are provided guidance regarding the unique financial challenges and opportunities that come with military service from initial entry through separation.

### Forward Focus

In 2023, we look forward to completing the process of refining course content and transitioning to the AdvanceNet Learning Management System (LMS), finalizing the accreditation of TAKE COMMAND and the partnership with The American College, creating new course content, and the development of an APP for TAKE COMMAND. Each of these initiatives provide the opportunity to grow as we look to broaden our scope and engage future users and organizations.

“Education must not simply teach work – it must teach life”



W.E.B. Du Bois

# EDUCATION PROGRAMS

We continued to focus our educational programs on active-duty and reserve service members. Concurrently, we expanded our programs to address the financial education needs of other sectors of the community. In 2021, our volunteer instructors conducted 119 financial education presentations to 2,657 people using in-person, virtual, and web-based programs. More than 90% of our presentations were delivered to military members. Attendees from across the United States included:

- Service members in all military branches, to include active-duty, reserve, and national guard components
- Military spouses
- Military veterans
- College SROTC cadets and midshipmen

Our presentations on financial education for the civilian sector included law enforcement officers at the FBI National Academy, the Fort Worth Police Academy, and Habitat for Humanity.

Our Money Matters Online program continues to provide education on basic financial principles to pre-teens, teens, and young adults worldwide. Currently, our Money Matters Online program is used in educational curriculum in 44 states and six foreign countries!



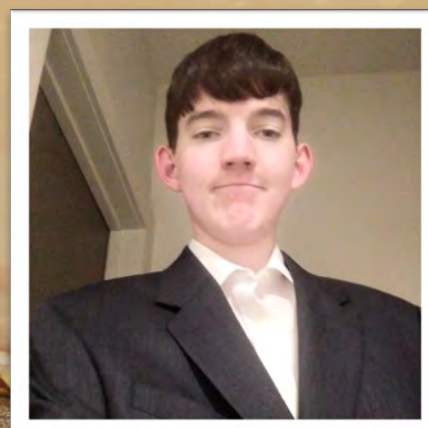
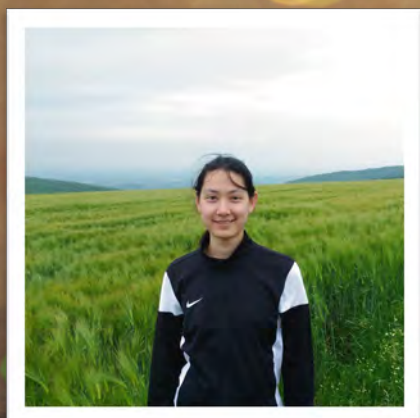


# 2022 Scholarship Recipients



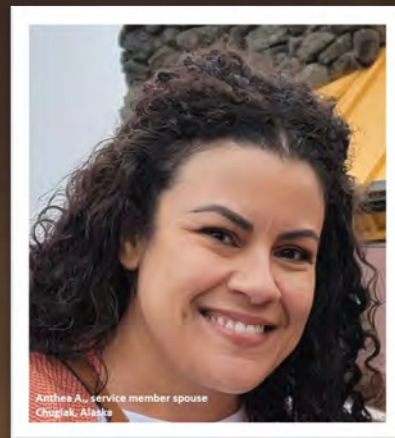
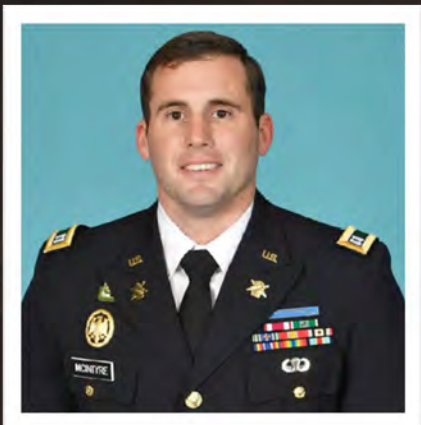


# 2022 Scholarship Recipients

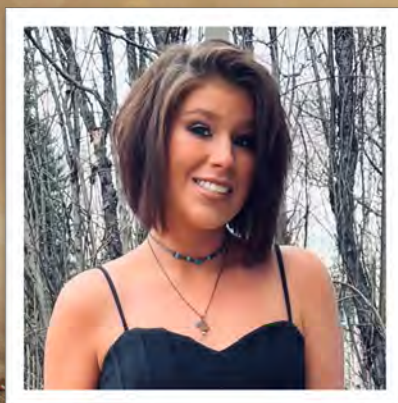
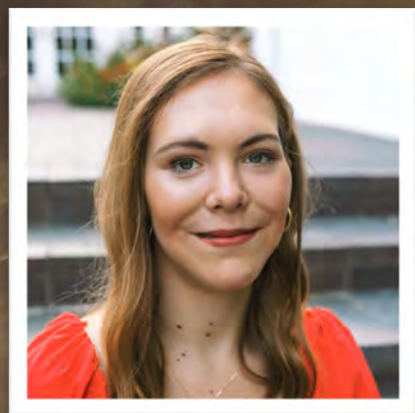




# 2022 Scholarship Recipients

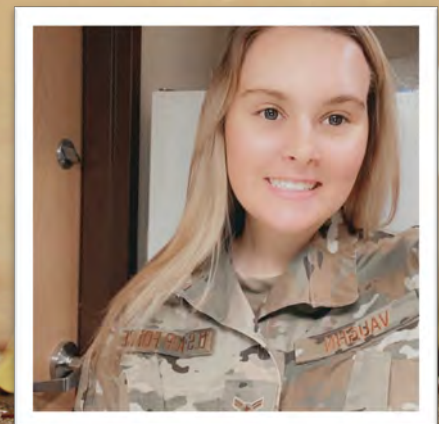
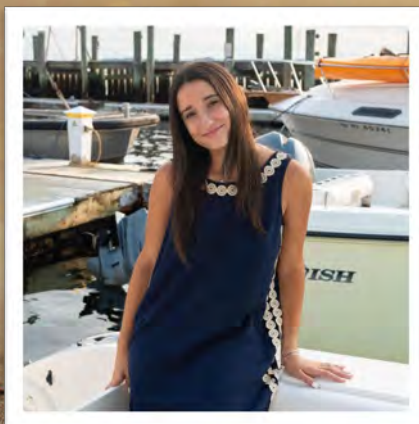
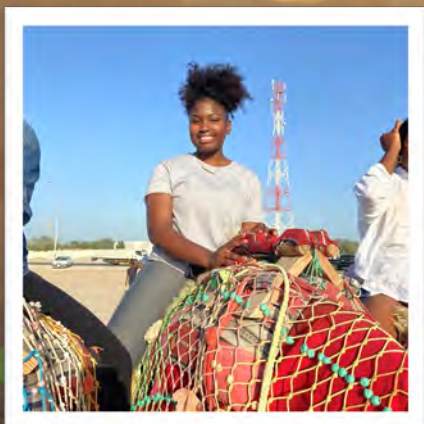
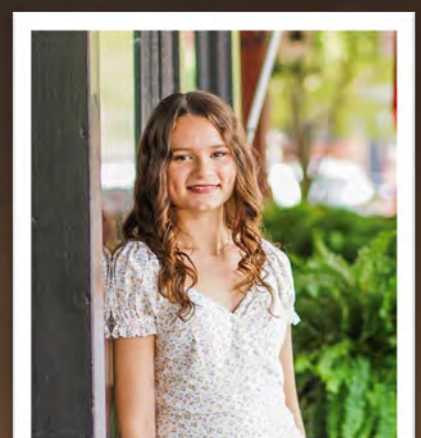
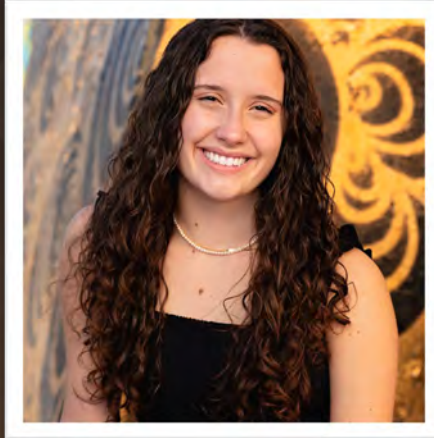


Amber A., service member spouse  
Chugiak, Alaska





# 2022 Scholarship Recipients





## 15th Annual “Chip-in” for Education Golf Classic

Our annual charity golf tournament was held September 23, 2022, at Bear Creek Golf Club.

We are pleased to report that the charity golf classic and virtual silent auction that ran concurrently netted \$45,388.53 to fund our Carroll H. Payne Scholarship program, which benefits those seeking college and trade school degrees. Twenty-two sponsors, 148 golfers, 38 volunteers, and 53 bidders made it possible.

### Honorary Sponsors \$5,000

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### Doctorate Sponsors \$2,000

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### Master Sponsors \$1,500

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### Hole Sponsors \$500

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We look forward to seeing you at future golf classics! Visit [www.fcef.com/golf](http://www.fcef.com/golf) for details and registration. Thank you for your continued support.

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## 2nd Annual FCEF Charity Clay Shoot

In April 2022, two sponsors, five FCEF staff members and Defender Outdoors Clay Sports Ranch hosted 48 guests and nine dedicated volunteers. We enjoyed a great morning of breaking clays and raffling off two marvelous shotguns, netting \$4,391.00 benefiting our financial educational programs. Net proceeds represented an 50% increase from prior year. Visit [www.FCEF.com/clay](http://www.FCEF.com/clay) for more.

### Pull Sponsor \$2,500

First Command Pathfinders District

### Trap Sponsor \$1,000

Laserfiche





# Thank You to Our Generous Donors

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over \$500,000	Pinnacle Club
\$100,000 to \$499,999	Leaders Society
\$50,000 to \$99,999	Champions
\$25,000 to \$49,999	Impact Partners
\$10,000 to \$24,999	Trailblazers
\$5,000 to \$9,999	Pathfinders
\$1,000 to \$4,999	Ambassadors
\$100 to \$999	Patrons
\$1 to \$99	Friends of the Foundation

**FCEF Board and Staff Members appear in bold blue.**



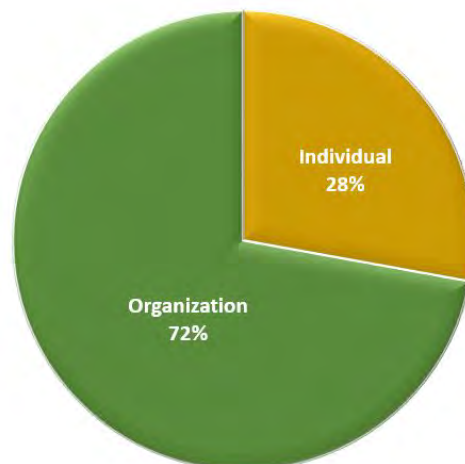
# FINANCIAL HIGHLIGHTS

*Educating those who serve with the help of our donors!*

Revenue from special events and investments continues to decline due to economic uncertainty, market volatility, and inflation. We are grateful to our dedicated corporate and individual donors for their shared commitment to our mission. We continue to look ahead and plan to diversify revenue, modernize our content with new technology, and build new relationships with more organizations that share our vision for the military community

## Statement Of Activities

Public Support and Other Revenue	2021 (Audited)	2022 (Unaudited)
Donations	\$899,328	\$970,347
FEM Seminar Income	\$38,990	\$47,150
Special Events	\$48,921	\$5,136
Other	\$96,960	\$85,035
Investment Income	\$99,149	(\$204,672)
<b>Total Revenue</b>	<b>\$1,183,348</b>	<b>\$902,996</b>
<b>Program Services Expenses</b>		
Scholarships	\$181,888	\$220,112
Education	\$605,289	\$741,777
Federal Employee Seminars	\$38,118	\$34,305
Development	\$0	\$88,038
Management and General Administrative	\$148,891	\$114,057
<b>Total Expenses</b>	<b>\$974,186</b>	<b>\$1,198,289</b>
<b>Net Assets</b>		
At Beginning of Year	\$1,831,724	\$2,040,886
At End of Year	\$2,040,886	\$1,745,593
<b>Increase (decrease)</b>	<b>\$209,162</b>	<b>(\$295,293)</b>







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FCEF is immensely grateful for the volunteers who donated their time and talents in 2022 to further our mission to *educate those who serve*. Volunteers change the world!

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