

WABC

WHATCOM ASSET BUILDING COALITION



Welcome to the WABC Quarterly Community Meeting

Steering Committee Members

Lorena Shah – *Opportunity Council*

Yarrow Greer – *Opportunity Council*

Emily Hermansen – *Opportunity Council*

Patty Boyce – *United Way of Whatcom County*

Katherine Freimund – *Whatcom Literacy Council*

Caitlin Willson – *WECU*

Ashley DeLatour – *FuturesNW*

Megan Wingo – *FuturesNW*

Michael Cox – *Whatcom County Library System*

Edith Tate – *Opportunity Council*

Kevi Veldman – *Opportunity Council*

Joy Monjure – *League of Women Voters*

Land Acknowledgement

I would like to begin by acknowledging that we gather today on the ancestral homelands of the Coast Salish Peoples, who have lived in the Salish Sea basin, throughout the San Juan Islands and the North Cascades watershed, from time immemorial. Please join me in expressing our deepest respect and gratitude for our indigenous neighbors, the Lummi Nation and Nooksack Tribe, for their enduring care and protection of our shared lands and waterways.

Treaty Day is observed on January 22nd
Learn more about the Point Elliot Treaty [HERE](#)

Mission Statement

The Whatcom Asset Building Coalition (WABC) is a community collaboration supporting financial self-sufficiency through education and advocacy.

Our mission is to foster collaboration in the community to increase the financial stability of people in Whatcom County.



Agenda

Quarterly Community Meeting: Asset Building for Families

- Welcome, housekeeping, and introductions
- Connection Activity
- Introduction to ALICE – Patty Boyce, United Way of Whatcom County
- **WABC KEYNOTE PANELISTS:** Juan Madrigal, Amy Hickel, and Kevi Veldman of Opportunity Council. David Ellsworth-Keller, Kulshan Community Land Trust
- Member updates and resource round table

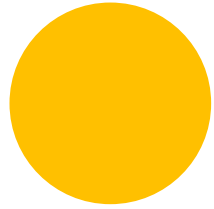
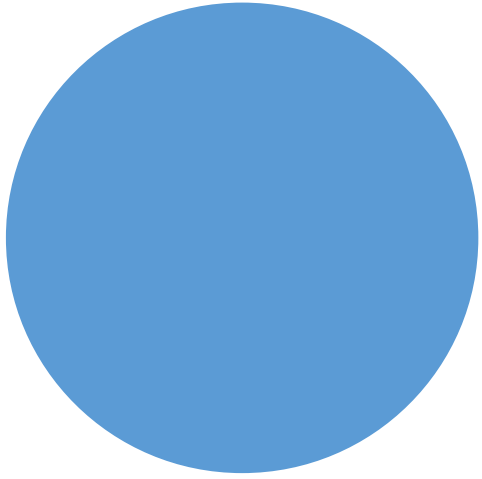
Connection Activity

1. If you could give yourself at this time last year a piece of advice, what would it be?
2. What's your favorite event to watch during the winter Olympics?
3. What is your current relationship to or familiarity with family asset building? What do you hope to learn from today's topic?

Juan Madrigal – Opportunity Council

Amy Hickel – Opportunity Council

Kevi Veldman – Opportunity Council



Project X-it

A program of the
Opportunity Council



Program Elements



FINANCIAL LITERACY
DEVELOPMENT



MENTORING



INCENTIVIZED GOAL
SETTING



CHILD SAVINGS
ACCOUNTS



KNOWLEDGE
NIGHTS



MENTOR COMMUNITY
TRAINING

Financial Literacy and Renter Education (FLARE)



Asset building



Money habitudes



Budgeting



Spending



Savings



Prioritizing debt



Goal setting

Incentivized Goal Setting

Families can earn up to \$2,000 over the course of Project X-it for completing goals supporting:

- Income
- Savings
- Debt Amount
- Money Management
- Debt Type and Situations
- Financial Crisis History
- Financial Education



Project X-it Main Goal

Participant Name: _____ Signature: _____ Date: _____

Mentor Name: _____ Signature: _____ Date: _____

S.M.A.R.T. Financial Goal: _____

New or Revised Goal? New Revised

Goal Length: Short Term (≤ 6 Months) Mid Term (≤ 12 Months) Long Term (≥ 12 Months)

Goal Type:

<input type="checkbox"/> Income	<input type="checkbox"/> Savings	<input type="checkbox"/> Debt Amount	<input type="checkbox"/> Money Management	
<input type="checkbox"/> Borrowing Money	<input type="checkbox"/> Money Emergencies	<input type="checkbox"/> Financial Education	<input type="checkbox"/> Supporting Goal	
Steps for Achieving Goal		Value	Target Completion Date	Date Completed
1.				
2.				
3.				
4.				
5.				

For Project X-it Specialist use:

Goal was achieved by target date Date Achieved: _____

Goal was achieved by extended target date Date Discontinued: _____

Goal terminated Date \$ Deposited: _____

Program Specialist Approval:
Signature: _____ Date: _____

Updated 6/13/19

Goals Examples



Income Goals

Returning or enrolling in school
Starting a home business



Savings Goals

Start an emergency fund
Save for vehicle repair
Save for health care



Money Management

Create a budget
Track expenses
Paying down debt

Knowledge Nights

Small business
development
and ownership

Homeownership

Cooking on a
budget

Energy saving
and conservation
tips

Follow up
F.L.A.R.E. courses

Organizational
skills

Taxes

Planning for the
future

Free Family
Activities

David Ellsworth-Keller – Kulshan Community Land Trust

Member Resource Roundtable