

2022 SOCIAL IMPACT REPORT



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INTRODUCTION



Since 2000, Mission Wealth has had a record of outstanding community support, gifting a percentage of our firm profits year-over-year to local, national, and international nonprofit organizations. We are proud to now give back to over 100 nonprofit organizations each year. Through Mission Wealth Gives Back, our social impact program, which includes our employee matching gifts, employee volunteer time off, regional volunteering events, a new Volunteer Affinity Group, and regional budget for philanthropy, we have helped thousands throughout the country and internationally.

Giving back is a big part of our culture at Mission Wealth. Our volunteering strategy allows us to stay close as a team and connected within the communities we serve.

Diversity, Equity and Inclusion is also paramount to our social impact philosophy. We have a passionate and active DE&I Taskforce along with Employee Resource Groups that collaborate to recognize and celebrate various employee cultures, backgrounds and experiences, and create allies and understanding across our company and our wider communities. In 2022, we furthered our DE&I mission by investing in our education and awareness, introducing Mission Wealth Scholars, a scholarship program that focuses on underrepresented populations in our industry, while continuing to create an inclusive environment for all.

These programs and activities are integral to our goal of ensuring that Mission Wealth has a lasting positive impact on the communities we live in, the people we serve, and the greater world. We are proud of the momentous strides our team and company have made in social impact in 2022 and we look forward to the change we can make in 2023.

Seth Streeter
Co-Founder and Chief Impact Officer

MISSION WEALTH GIVES BACK

Mission Wealth Gives Back, our social impact program's goal is to ensure that the company has a lasting positive impact on the communities we live in, the people we serve, and the world at large. We operationalize this through multiple programs.

Nonprofit Involvement

Providing services and empowering communities.

Volunteering and Giving Back

Engaging with communities in which we live and work.

Diversity, Equity, and Inclusion

Fostering a diverse and inclusive workplace. Leading by example for the financial services industry.





IMPACT

2022 FOCUS AREAS



Environmental

Mission Wealth is committed to helping create a safe, healthy and sustainable world for our partners and communities. We support environmental protection, conservation, and public education.



Health & Human Services

We support organizations that address the social determinants of health, including stability, finance, education, housing and food access.



Education & Youth

Since conception, Mission Wealth has been dedicated to providing assistance to reduce the barriers that cause financial disparities, including financial education.

ENVIRONMENTAL SPOTLIGHT

SEA CENTER SOLARIZATION

Mission Wealth is proud to continue our philanthropic partnership with the Santa Barbara Museum of Natural History Sea Center to bring a 52-kilowatt solar electric system as a part of the Community Environmental Council's Solarize Nonprofit program.

The panels are projected to supply at least 50% of the Sea Center's electricity and over the next 25 years, is expected to save at least \$300,000 - the savings from this solar project will go directly back to the Sea Center's programs and exhibits that support local marine life protection and vitality.







HEALTH & HUMAN SERVICES SPOTLIGHT

UKRAINE HUMANITARIAN EFFORTS

Mission Wealth is proud to support the humanitarian relief efforts for the people of Ukraine. The human suffering, loss of innocent lives and the destruction of a country before our eyes is disturbing on so many levels. Not only do our thoughts go out to all those impacted, we are actively directing charitable support to organizations helping with the refugee crisis.

Our team decided to support two organizations, CARE and Direct Relief. More than \$30,000 was donated by Mission Wealth teams and individuals. In addition to this campaign, Mission Wealth continues to provide a dollar-for-dollar match for all employees, which recently included several organizations supporting Ukraine.





HEALTH & HUMAN SERVICES SPOTLIGHT

FOOD SECURITY ACROSS THE U.S.



North Texas Food Bank: 12,000 meals or 15,500 pounds

Food Bank of Contra Costa and Solano: 2,000 pounds

Feeding San Diego: 9,500 pounds

Food Bank of the Rockies: 12,000 meals or 13,000 pounds

St. Mary's Food Bank: 26,000 meals or 30,000 pounds

Mission Wealth continued our dedication to food security through volunteering as groups throughout 14 communities across the U.S. Together, we were able to help package and distribute more than approximately 70,000 pounds of food for families facing hunger daily.



In Arizona, food insecurity is a problem 2 million Arizonans are faced with every year. Nearly 30% of our neighbors are considered working poor, living on wages that barely cover housing and other basic necessities. While in Scottsdale, Arizona for the Mission Wealth annual retreat, team members came together and supported the local community by volunteering together at the St. Mary's Food Bank.



EDUCATION & YOUTH SPOTLIGHT

MISSION WEALTH SCHOLARS

This year, Mission Wealth partnered with the Center for Financial Planning to launch a scholarship program that aims to advance the financial planning profession by providing financial assistance to individuals pursuing their CFP® certification who are from populations underrepresented in the profession.

“Mission Wealth is thrilled to create educational opportunities for impressive candidates to pursue a financial planning career. This provides professional advancement and empowers their ability to positively impact the lives of client families they will be able to serve.” said Mission Wealth Founder and Chief Impact Officer Seth Streeter.

The scholarship awards up to \$5,000 per student seeking to complete an undergraduate-level or a certificate-level CFP Board-Registered program, allowing them to sit for the CFP® exam.





COMMUNITY

EMPLOYEE GIVING

Giving back is embedded into the Mission Wealth culture and we feel privileged to serve others. We furthered this by introducing a new impact benefit package for all employees, including volunteer time off, team volunteering opportunities, and several virtual volunteering events.

We continue this impact by providing several giving opportunities, including firm sponsorships and historical partnerships, employee donation matching, and team giving.

Volunteering

- **510**
hours of VTO used
- **80**
nonprofits volunteered at
- **12**
group volunteering events

Donations

- **\$206k**
total donated
- **\$54k**
donated from teams
- **\$8k**
donated from individuals
- **141**
nonprofits supported

**figures are reported from December 16, 2022*



Animal Welfare and Rescue

Colorado Zoological Trust
Humane Society of Silicon Valley
Network for Animals
One Tail at a Time
Operation Kindness
Plan B to Save Wolves
Retired Racing Greyhound Rescue
Saving Hope Animal Rescue
Texas Wolfdog Project
The Asher House
West Suburban Humane Society

Education and Youth Development

Aaple Academy
AYSO Santa Barbara
Barca Academy Austin Soccer Club
Boy Scouts of America
CalCPA
California State University Channel Islands
CALM
Camp Goodtimes
Children International
Dos Pueblos Engineering Academy
Evans Scholar Foundation
Family Service Agency
Friday Night Lights Youth Football
Goleta Girls Softball Association
Guild of Family Services of Greensboro
Lighthouse Writers Workshop

Mission Wealth Scholars
Mooseheart Child City and School
New Horizon School Irvine
Page Youth Center Basketball League
Partners in Education
Riviera Ridge School
Santa Barbara Stingray Youth Rugby
Santa Barbara Middle School
Santa Barbara Soccer Club
Scholarship Foundation of Santa Barbara
Solid Foundations
South Bay Polo Club
Teddy Bear Cancer Foundation
Texas Valor Education Foundation
Toys for Tots
UCLA Anderson School
Unite to Light
Wellesley Students' Aid Society
Westside School
YMCA San Francisco

Environmental

Community Environmental Council
Explore Ecology
HEAL Utah
Keep Tahoe Blue
Reconsidered Goods
Santa Barbara Botanical Garden
Santa Barbara Maritime Museum
Santa Barbara Museum of Natural History
Washington Trails Association

Food Insecurity

Community Produce Co-Op
Feeding San Diego
Food Bank of Contra Costa and Solano
Food Bank of Santa Barbara
Food Bank of the Rockies
Fort Bend Seniors Meals on Wheels
LA Food Bank
North Texas Food Bank
Rauschenbusch Metro Ministries
SB Meals on Wheels
Second Harvest Food Bank
St. Marys Food Bank
Utah Food Bank
World Central Kitchen

Health & Human Services

A3 Foundation
African American Male Initiative
Aha!
AMCOB
American Cancer Society
Armenia Fund
Austrian American Council West
Care.org
Children's Heart Foundation
Direct Relief
DVS
Ellie Fund
Giving BackPACKS
Gwendolyn Strong Foundation
Habitat for Humanity

Handicap Development Center of DM
Home for Our Troops
Homes for Heroes
Horsepower Therapeutic Riding
Jodi House
LDS Humanitarian Aid Fund
Myalgic Encephalomyelitis Action Network
Michael J Fox Foundation
Minds Matter San Francisco
Mobile Loaves & Fishes
Movember Foundation
National Alliance for Mental Illness
National MS Society
Pancreatic Cancer Action Network
Park City Historical Society
Sabil USA
Salvation Army Chicago
Sandpipers
Scleroderma Foundation
SEE International
Senior Center of West Seattle
Senior Concerns
Sharia's Closet
St. Jude Children's Hospital
UCSB Social Psychology Fund
VNA Health

Other

Colorado Gives
Financial Women of San Francisco

Junior League of Greensboro
National Charity League
National Financial Planning Association
Oceanhills Covenant Church
Our Lady of Grace Catholic Church
Reality Church of Santa Barbara
Santa Barbara Council of Charitable Gift Planners
Santa Barbara Estate Planning Council
Santa Barbara Rotary Sunrise Chapter
Social Ventures Partners
St. Vincent de Paul of San Roque
Urban Muslim Minority Alliance
Women's Foundation of Colorado
Women's Fund of Santa Barbara
Young Professionals of Santa Barbara

