

M O N E T A

Impact *in motion*

A Message from Moneta's CEO

The work of the Moneta Charitable Foundation (MCF) reflects our firm's values and practices. In fact, Moneta has been recognized as a top charitable company because we understand and appreciate the importance of giving back.

With a mission to foster financial literacy and increase economic access, as well as support organizations that help our communities to thrive, MCF provides grants and amplifies nonprofit service opportunities. Our team members contribute their time, talent and treasure in ways that create true impact across our geographic footprint. To encourage these commitments, our firm provides eight hours of paid "Volunteer Time Off" annually to each employee.

In the pages that follow, you will see that we serve as donors, leaders, and hands-on supporters to our nonprofit partners across the country. One such partnership is with EVERFI, connecting with our communities' schools to educate students about healthy financial habits. Another example is our impact investment initiatives which boost entrepreneurship through microloans to businesses and families in under-resourced communities.

MCF will celebrate 25 years of impact in 2024, and we're just getting started.

That's Money in Motion... Mission-Aligned and Meaningful.



Eric Kittner
Moneta CEO & Chairman



Moneta Charitable Foundation

Mission: Equipping people to build their financial capabilities and family assets by partnering in initiatives that focus on economic empowerment and access, as well as supporting organizations that help our communities to thrive.

Awards

Moneta has been recognized by the **ST. LOUIS BUSINESS JOURNAL** as

One of the Most Philanthropic Companies in the Region,

based on our contributions of charitable dollars and volunteer time.

▶ SINCE 1999

454

Community Organizations Funded

\$4,582,629

Total Donations

▶ 2022

128

Organizations Funded

\$443,175

Total Donations



Economic Access

Boosting Financial Literacy

Earning. Saving. Investing.
Protecting. Spending.
Borrowing.

Boosting financial literacy is a priority for MCF. We think everyone should have access to knowledge and real-world skills that enable smart decision making.

To that end, we're collaborating with a number of nonprofits to deliver education and training, including **EVERFI, Inc.** and **Junior Achievement**.

Junior Achievement

Junior Achievement (JA) inspires young people to succeed in a global economy.

Lesson plans focus on financial literacy, entrepreneurship, and work readiness. Moneta volunteers spend a full day in classrooms, providing hands-on interactive activities to students.



Moneta volunteers boost JA-in-a-Day

EVERFI, Inc.

“EVERFI is pleased to work with the Moneta Charitable Foundation to deliver financial literacy learning opportunities to students across the country. Together, we're equipping young people with new knowledge, promoting healthy money habits and boosting sound financial choices.”

EVERFI Service Team

A national organization that enables educators to bring real-world learning into the classroom.

MCF sponsors EVERFI's Financial Literacy Program which provides students across the country with digital financial literacy education at no cost to the school district. The program teaches students how to make wise financial decisions to promote lifelong financial health and well-being.

MCF volunteers engage with students enrolled in the program in their classrooms, leading activities and discussions that reinforce the content from the course.

2022 School Year Program Impact

22 Schools	1,483 Students	2,655 Learning Hours	54% Average Knowledge GAIN Students' assessment scores rose from 55 to 85 out of 100
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EVERFI classroom visit 2023

Impact Investing

Investments that create positive social impacts beyond a financial return.

In 2023, MCF piloted new ways to move money to mission by investing in impact-driven initiatives. By entering partnerships to boost under-resourced communities, MCF is increasing economic potential and helping to build wealth.

Justine PETERSEN (JP)

JP is a nonprofit Community Development Financial Institution (CDFI) that provides financial services for individuals who may lack access to traditional banking products due to insufficient credit history.

\$100,000
Loan Amount



“I'm grateful that Moneta introduced me to Prosperity Connection, a nonprofit that promotes access to reliable financial products, services and education. I began volunteering at Prosperity Connection to educate others on the importance of credit. Seeing a person's face light up when they realize improving their financial outlook is within reach encourages me to continue sharing my knowledge.”

Anniece Robinson
Moneta Team Operations Manager

Thriving Community

MCF is pleased to have provided our time, talent and treasure to more than **450 nonprofits** over the past 24 years, including...



American Red Cross

Each year, Moneta employees donate blood at multiple drives hosted on-site by the American Red Cross.



St. Louis Area Foodbank

At a community-wide volunteer initiative led by St. Louis Area Foodbank, Moneta employees joined the effort to pack 200,000 meals for neighbors with food insecurity.



Bike MS

For nearly two decades, Moneta has been a sponsor and supporter of Bike MS as cyclists and volunteers.



Nine PBS

The firm's significant gift to Nine PBS boosted the organization's Early Education Initiative, ensuring wide access to high-quality resources on the air, in the classroom, and at home.

The Bach Society of St. Louis is the community's oldest choral group, bringing classical music to the region for over 75 years. I especially appreciate the diversified programming and free concerts that allow the Society to reach new audiences. Recently, the Moneta Charitable Foundation was a sponsor of the "Bach to Black" event, shedding light on how Bach's works continue to offer new perspectives.

James Chalmers
Moneta Advisor



Missouri Baptist Medical Center

Moneta Partners and MCF collectively donated funds to install state-of-the-art technologies in the hospital's cardiovascular space, creating opportunities for physicians to research and consult on life-saving care.

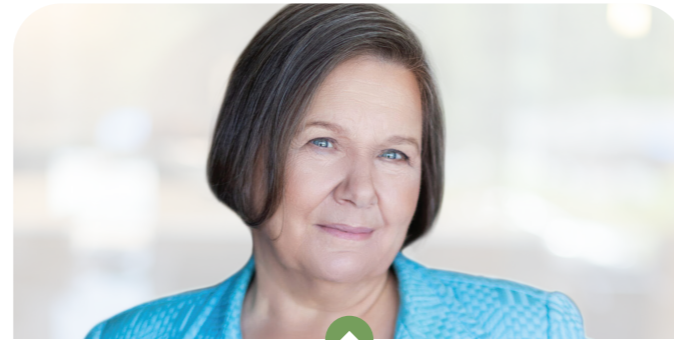


American Heart Association

Moneta team members "Go Red" for AHA, helping our community to build healthier lives, free of heart disease and stroke.

Danforth Plant Science Center is improving human health by generating higher crop yields for our growing global population. As Chairman of the Friends Committee, I see firsthand how support from the MCF directly funds innovations to feed the hungry, improve the sustainability of farming, and in the process, boost the economy of St. Louis.

Tim Halls
Moneta Partner



Scholarship Foundation of St. Louis

In 2022, the Moneta Charitable Foundation Scholarship was established in honor of Partner Nancy Georgen's 50 years of service, helping fund college tuition for a student with financial need who is pursuing a career in business.



Moneta is a longstanding partner of the United Way and supports their network of agencies, tackling pressing issues in the communities where we live and work.



Ronald McDonald House (RMH)

Moneta employees are longtime volunteers at RMH, where they prepare nutritious meals for guest families who spend lengthy days at the hospital.

Youth Ambassadors (YA) empowers underserved youth to become future community leaders who create positive change. MCF's support helps expand and improve the YA program, providing Kansas City area teens with important life skills and adult mentors.

Margie Glenn
Moneta Advisor

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