

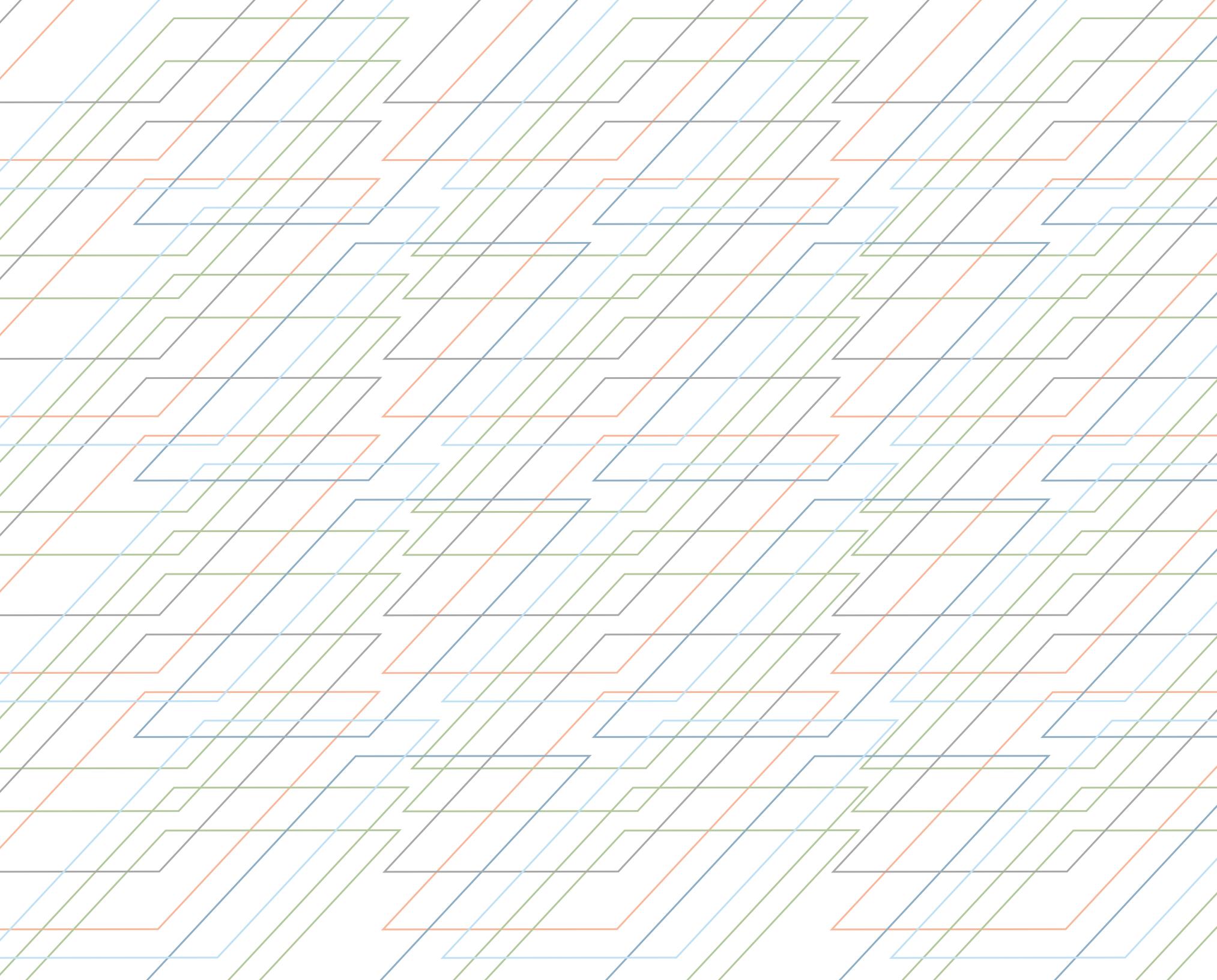


HISTORIC CHALLENGES. TRANSFORMATIONAL GROWTH.

SNAPSHOTS OF 2019-2020

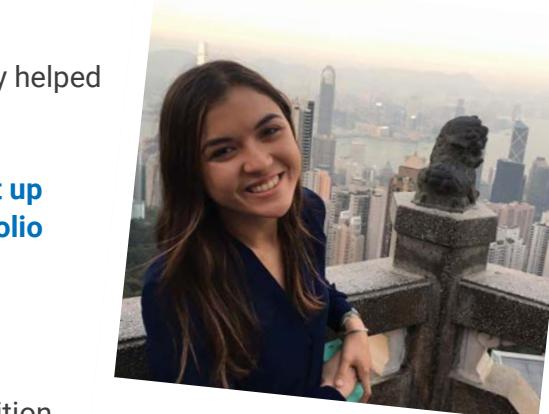
Annual Impact Report





Dear CCEE Supporter,

Today, I work at Microsoft as one of forty in my cohort for their Early-Career Finance program. **I believe I would not be in this role if it were not for CCEE and my high school teacher Dan Adler.** They helped to shape the trajectory of my life for the better.



When I was interviewed for my job, I was asked, "Why are you interested in finance?" **I proudly brought up my first real experience with finance, my freshman year of high school at the CCEE investment portfolio competition.**

This is what got me hooked on finance and economics.

At the time, I was really just interested in winning some money, but I learned through that first competition the power of economic and financial knowledge. At age 14, now knowing about compound interest and risk tolerance, I quickly invested the cash winnings from that first competition into dividend yielding stocks.

In high school, I took both AP Economics classes and a finance class taught by Mr. Adler. He provided us with engaging and dynamic classes. We learned fundamentals of economics and finance that I still use to this day. **Our education was brought to life through interactive classroom activities which helped me learn about game theory and opportunity cost in a way that a textbook could never provide.** We learned practical skills such as how to open a retirement account or income tax preparation. My peers and I all became IRS certified Volunteer Income Tax Assistance (VITA) preparers. As a high school student not only was I able to do my own taxes, but I was also able to help out the community and prepare countless other taxes for low-income individuals and families. Even today as a finance professional, I know many of my colleagues are either fearful or clueless when it comes to preparing their taxes. Because of the learning and experience I gained in high school. I am not fearful of tax season and have a strong understanding of tax preparation.

When I look back at my time in high school, the opportunities provided to me by CCEE make up many of my fondest moments. I participated in many CCEE competitions and was fortunate enough to have great success. I learned how to put together an investment portfolio. I got to travel to Missouri for the National Personal Finance Competition where I met students from around the nation, some of whom I am still in contact with. I gained skills such as teamwork and how to present in front of an audience.

I made memories that last a lifetime.

I owe a great deal of thanks to CCEE for providing me with opportunities that most individuals can only dream of. I'm also forever indebted to my teacher, Dan Adler, for teaching students like me and pushing them to accomplish things most would have never thought possible.

Thank you to both CCEE and Dan Adler.

VISION



An economically and financially literate California

MISSION

To improve California's economic future by teaching economics and financial literacy, especially in underserved communities.

APRIL 2019

OUR YEAR

PROCESS

CCEE's work is guided by three pillars: research, education, and advocacy. CCEE aims to educate Californians through teacher, student, and community programs. CCEE seeks to create a baseline of knowledge for students and support their progress and understanding from elementary school through high school graduation. Continually growing scale and impact is a priority for CCEE, and in order to do so, CCEE will continue to increase the number of affiliate-centers for economics education throughout the state, while strategically leveraging the power and impact of California's educators by supporting their K-12 instruction.



DENISE GUTIERREZ BECOMES CEO AND PRESIDENT

Development expert Denise Gutierrez, a native of El Sereno, CA, a neighborhood in East Los Angeles, joined CCEE in 2019. She came prepared to help the organization expand its footprint across California.

"When I was the first in my family to graduate from college and begin my career, I pledged that I would always remain in service to the community that I came from."

President Gutierrez

CCEE BEGINS A ONE-OF-A-KIND PARTNERSHIP WITH LAUSD

In 2019 CCEE expanded its services to the largest school district in the nation when it formed a partnership with the Los Angeles Unified School District. Through free workshops, Los Angeles' students and their families learned about basic personal finances while playing hands-on games like "occupational uno" and "budget puzzles." CCEE was able to deliver these events to up to a hundred families at a time thanks to its dedicated college student and professional volunteers.

MAY 2019





PROGRAM SPOTLIGHT OUR FIRST FAMILY FINANCIAL LITERACY EVENT

A WONDERFUL ACCIDENT

In 2015, middle and high school teacher Connie Moore-Kelly ran into California State Controller Betty Yee at the most unexpected place: a dress shop. Connie—a long-time educator who'd always seen the value in personal finance education—couldn't pass up the opportunity to ask Controller Yee if she'd come speak to her students. To her surprise, Controller Yee graciously agreed to come speak at her school in Los Angeles that following week. When she got home, Connie called then-CEO Allysun Walker-Williams, "I just asked Controller Yee to my school next week. I want to make this impactful and meaningful. How can we work together to do this?" The next week, the inaugural Family Financial Literacy Event was born!

Connie and CCEE created an interactive learning event that incorporated the entire family in having conversations about topics such as savings, decision-making, and opportunity cost. At the heart of CCEE's programs lies educators like Connie. Her passion for her students, coupled with the organizational support of CCEE, has translated into a remarkable program that will continue to transform thousands of California's families' lives.

"By involving students and their families in structured conversations about money, we're not only empowering them to make positive decisions about their post-secondary aspirations—we're addressing financial issues that they could possibly be facing and alleviating stressors that prevent students from being able to come to class and focus fully on their education."

Connie Moore-Kelly



Pictured L-R:
Gladys Alfaro, Connie Moore-Kelly, Joshua Mitton



SINCE
2015

724
FAMILIES

have been trained at
Family Financial Literacy Events

JUNE
2019



NEVER TOO YOUNG MARKET DAYS

This past summer, in an elementary school library just outside of Downtown Los Angeles, CCEE's program staff taught LA's Best after school educators how to teach their students about tradeoffs and opportunity costs.

2019 Never Too Young LA's Best 4th grade Student, Cassandra*: Cassandra was disengaged and largely uninterested in most activities before her after school teacher, Maya, introduced her to the Never Too Young program. After learning how to save and balance a budget, Cassandra was encouraged to establish her own business as part of her final Never Too Young project. That's when Cassandra finally blossomed. *name changed to protect identity

"She came in here [my classroom] and... next thing you know, she's interested. She started the idea of making paper stars and then the boys went up to her and they were begging her to be a part of the business. I guess that's what she needed... to know that she does matter. You just see her with a big smile, her behavior changed. I talked to her mom and her mom was like, 'I don't know what you did but, thank you, because even during her regular school day I'm hearing good things now. And you know, she really did need that."

LA'S Best Never Too Young Program Educator



PROGRAM SPOTLIGHT
FEDERAL RESERVE INSTITUTE

AMARIS PORTILLO

In her second year of teaching economics, Amaris Portillo was seeking resources to enrich her class and make the subject more accessible for her high school students.

"I was completely overwhelmed. I'm the only teacher at my school that teaches economics so gathering information on my end was really hard."

She found just what she was looking for with the help of CCEE at the Federal Reserve Institute, hosted in partnership with CCEE's San Diego Center on Economic Education and the Federal Reserve Banks of San Francisco, St. Louis,

Dallas, Cleveland, Richmond, and Atlanta. "Finding the Federal Reserve Institute was just so time-saving and a huge opportunity to grow my knowledge," Amaris told CCEE. The summer institute is designed and taught by professional development trainers like Susan Kizer, a former high school teacher herself. For three days, educators stayed at dorms on University of San Diego's campus and attended daily sessions where they were immersed in instructional development on economics. Some activities included cutting a giant dollar bill to teach about monetary policy, simulations about career choices, and using the Federal Reserve's Economic Data (FRED) to help economics concepts come alive in the classroom. "Students graduate and go on to college, trade school, or just get another job and they're not using applied economics until BOOM! They're sitting there, needing to figure out financial aid or student loan repayment programs and they need economic knowledge to do that, but they don't have it," explained Amaris when asked why she felt it was so important to learn about economics in high school.

Teachers like Amaris are keeping economics and personal finance education alive in California's K-12 schools by dedicating their valuable time to learning how to bring interactive material to their students' learning experiences.



JULY
2019

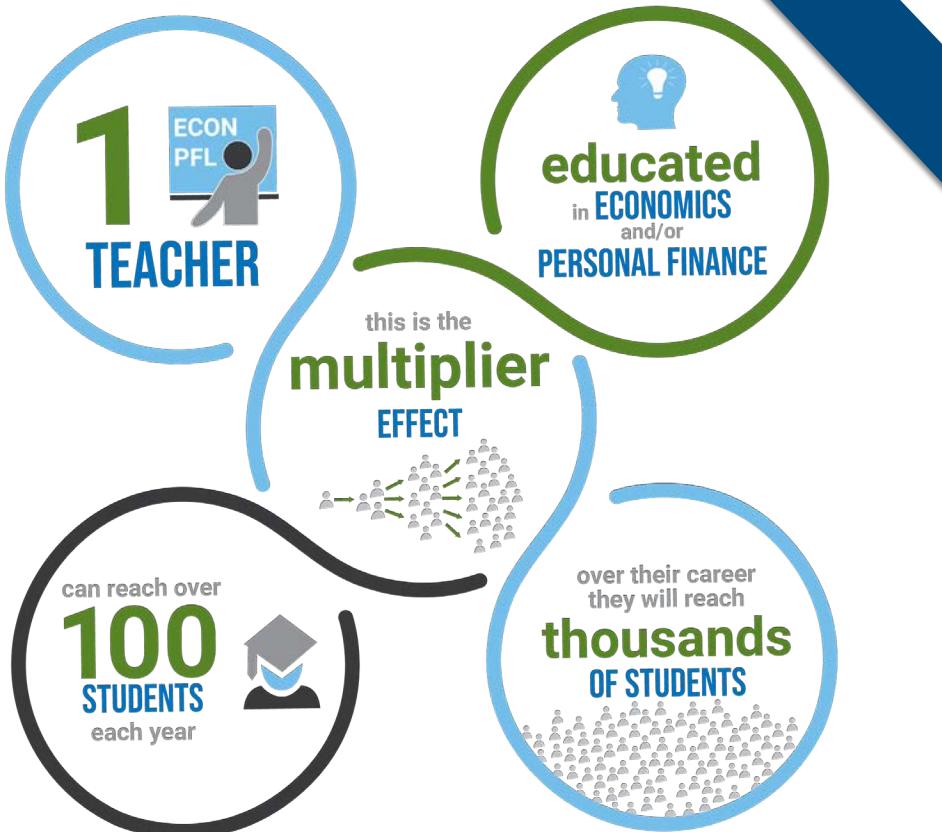


CASE STUDY SPOTLIGHT CCEE-CASET CERTIFICATION (SECOND COHORT) KAREN CLARK YAMAMOTO

Karen Clark-Yamamoto felt a deep sense of affirmation at the end of teaching a semester of economics to students grappling with "senioritis" – in the face of a global pandemic – when she received the following email:

"First of all, I want to say Happy Teacher's Appreciation Week, Mrs. Clark. Your class and teaching is always the best, and your class is always creative. I look forward to going to your class every day. I hope you are being safe. I would like to thank you for making these assignments not that complicated to do. Wish I had you for more than a semester. Thank you for everything you have done for me! I am really blessed to have you as my economics teacher this year!"

Karen attributes a lot of her success to her time spent at a week-long certification program that CCEE hosts, along with the California School Association of Economics Teachers (CASET). "It was amazing to get those hands-on resources and learn new approaches to my economics class."



Karen is a primary example of how empowering educators are a pathway to affecting real change that can extend beyond the walls of a classroom. After participating in the certification program, Karen took the initiative to host her own breakout session for other educators at the 2020 California Council on Social Studies Conference, with over 1,000 educators in attendance. She also led professional development sessions and K-12 economics and personal finance to peer teachers at a district seminar – effectively spreading the knowledge she's learned to her broader network.

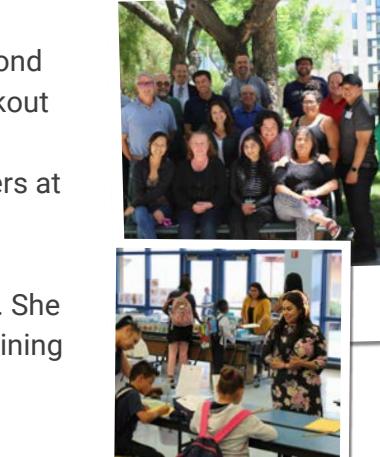
As the department head and a student teacher mentor, Karen attained a renewed focus from the certification program. She has even championed an inspiring initiative to co-teach with another educator and their Special Education class, combining the students with her general economics class.

During the class, one of the Special Education students, Simone*, was encouraged by Karen to enroll in a competition to create an app. Simone's project, a food allergy app, took 4th place in the entire competition. If it wasn't for Karen, Simone might not have ever believed it was possible to compete in a statewide competition. Karen's dedication to her students reaches far and wide, creating opportunities that will change their lives. "If I hadn't gone to CCEE-CASET's certification program, I probably wouldn't have accomplished this much with my economics class. It's amazing."

*Name has been changed to protect identity

"If I hadn't gone to CCEE-CASET's certification program, I probably wouldn't have accomplished this much with my economics class – a combined special education course at that. It's... amazing."

CCEE's "super teachers", such as Karen, will reach an average of **25 teachers** through their peer-training initiatives, effectively reaching **2,500 additional students** – causing a super teacher like Karen's multiplier effect to be **26x more than an average teacher's**.





DONOR SPOTLIGHT NICKOLL FUND FOR FINANCIAL LITERACY

A GENEROUS GIFT WITH A MONUMENTAL IMPACT

One morning while reading the news, John Nickoll learned that California's government had once again failed to enact legislation that would strengthen K-12 financial education in the state. As one of the pioneers of the North American Commercial Finance industry, John felt it was his unequivocal duty to connect California's K-12 students to the same opportunities that had contributed to his own life success. So, he went to the California Council on Economic Education (CCEE), a non-profit he knew was active in bridging the economic and financial education divide, and he donated the largest gift it'd ever received in its entire 65-year history: \$1,000,000.

John invested in himself and his learning by attending the University of Michigan Law School before eventually going on to create The Foothill Group Inc., a financial services company – now known as Wells Fargo Capital Finance, one of the nation's largest bank-owned asset-based lenders. With John's incredible gift, CCEE established the Nickoll Fund for Financial Literacy, which will make it possible to teach more of California's families about money and economics!

"A bright future for our families depends on the future success of California's students. If economic and financial concepts aren't included in their education, are we truly preparing them for life after graduation?"

John Nickoll



AUGUST 2019



PROGRAM SPOTLIGHT CCEE GALA

YOU'RE NEVER TOO YOUNG TO LEARN ABOUT MONEY

Oftentimes, after-school programs are composed of the most underserved students in our communities—90% of the students that are part of LA's Best qualify for free and reduced lunch. Initiatives like these are able to provide free expanded learning to California's students, especially those of low-income backgrounds. After-school programming is a great place to receive the additional education that's lacking in California's K-8 classrooms. CCEE's Never Too Young program provides after-school elementary students with meaningful and life-changing education about money and the world around them, as after-school program educator Jessica illustrated when she told us the story of Jasmine*:

"A lot of this program helps students feel either empowered or wanted, even helping them understand that they don't need to work for somebody if they don't want to. These students have that idea in their head now. One of our students, a fifth grader, actually put 'business woman' under her school portrait in the auditorium."

Given that the Never Too Young program bridges the economic and financial education gap for so many underserved elementary students across California, CCEE dedicated its 2019 Annual Gala Fund A Need to raise more funds to reach more students like Jasmine and raised enough money to sponsor 400 additional students!

*Name has been changed to protect identity

**23 SITES
TO BE FUNDED IN FY20-21**
at \$5,000 per site

\$115,000 RAISED IN FY20-21 FOR NEVER TOO YOUNG



TEACHER SPOTLIGHT

HOSTED CEE ANNUAL CONFERENCE IN CALIFORNIA

ECONOMICS TEACHERS UNITE!



Amy Hiatt using CCEE's benefit cost analysis apron



Amy Hiatt is the ONLY economics teacher at her high school in Northern California. This is a common situation that many high school economics teachers find themselves in. The important life-skills that economics teaches often go unrecognized, earning economics the reputation as a "dismal" subject, and which results in a huge gap in quality and learning opportunities for California's students. Most schools only hire a single teacher to teach the subject, and in many cases, that educator has barely received any economics or personal finance education themselves. With the challenges of "teaching in a silo" that economics educators face, it's crucial to help as many teachers like Amy network with their peers. Amy was able to do exactly that when she won CCEE's teacher scholarship giveaway to the Annual Financial Literacy and Economic Education Conference in Los Angeles!

At the conference, Amy attended seminars and met with peer-educators where she learned actionable and engaging teaching strategies, such as implementing Marvel movies into her decision-making lessons and even using cat videos to teach basic economics principles like supply and demand. At the end of the conference, Amy expressed her joy,

"The conference was great. I loved that I felt like I could walk out with so many nuggets of information I could bring back to my classes."

**400 TEACHERS
ATTENDED THE CONFERENCE**

41 states, 7 countries represented; 1100 students were reached

NOVEMBER 2019



**104 FINANCIAL
ADVISING PLANS**
have been created by
416 STUDENTS
*since the **Financial
Advisor Contest** first
began in 2012*

FINANCIAL ADVISORS CONTEST

The Financial Advisors Contest is a unique-to-California competition for high school students. It is considered the older sister of one of CCEE's other student contests, the Personal Finance Challenge (PFC). But unlike the PFC, the Financial Advisors Contest deals with more advanced financial and economic concepts.

Students work in teams acting as financial advisors. They provide advising services to a fictional client case-study. Teams of students are paired with mentors from the CFA Society Los Angeles. These mentors—consisting of local investment professionals—meet with students on a regular basis to provide insights on topics ranging from investment strategies, retirement goals, debt, and other personal finance issues.

This contest is key to CCEE's mission. Teachers, like Dan Adler who has been attending CCEE student contests for over a decade, incorporate the contest into their class curriculum. Students prepare for 4-6 weeks to answer questions about setting financial goals, balancing debt payments with retirement contributions, creating long-term investment plans, and developing a secure sense of financial wellbeing.

Dan sums it up best:

"Topics like these are badly lacking in California's current education system. Opportunities like the Financial Advisors Contest provide my students with the chance of tackling challenging financial issues and applying the knowledge gained into their own lives."



JANUARY

2020



PROGRAM SPOTLIGHT

FAMILY FINANCIAL LITERACY EVENTS WITH
LOS ANGELES UNIFIED SCHOOL DISTRICT

LEARNING ABOUT MONEY WITH FAMILIES

During CCEE's first Family Financial Literacy Event at the Los Angeles Leadership Academy, professional volunteer, Sam Whitman*, expressed wonderment at the eagerness of seven and eight year olds clamoring together to learn about the difference between their "wants" and "needs."

"I like to focus on programs like this that are preventative – just like we promote physical wellness, by teaching these families how to be financially literate, we're advancing the health of our society," he said as he passed out highlighters to the first graders so they could cross off the item on their list of "wants" they would pledge to save money for. When a student wrote 'new pair of school shoes' under his "wants" heading, Sam motioned to the student's mother and let her know that he'd cover the cost of new shoes. The student gleefully hugged Sam.

"Sometimes the difference in a student's life can boil down to a program like this, coupled with a little bit of extra support along the way," he explained as he returned to helping another young student decide if 'school' is a want or a need. *Name has been changed to protect identity



FEBRUARY 2020

SURVEY OF THE STATES IS RELEASED

It's been almost 100 years since California's Department of Education was established and yet entire generations of California's students have graduated year after year without fully understanding how to manage their money or make sense of the economic world they're living in. K-12 economic and personal finance education has not been strengthened since the single-semester of high school economics was made an official requirement for graduation 35 years ago. Despite these massive shortcomings in California's education system, the hard work of passionate educators, coupled with the generous support of CCEE's donors, has made it possible to teach students about economics and personal finance.

Teachers, like Emily Drum, are actively pursuing opportunities to learn more so that they can better prepare their students for life after graduation. "I love economics, and I want everyone else to love it just as much as I do," exclaimed Emily during this past round of the CCEE-CASET Economics Teacher Certification program.

CCEE's donors and supporters understand that when they are making a gift to CCEE, they are investing in rockstar educators like Emily. These teachers are the key to shaping bright futures for California's students.

In 2014-15, CCEE trained
518 EDUCATORS

In 2018-19, CCEE trained almost
2,000 EDUCATORS

Since 2014-15, CCEE has trained a total
5,451 EDUCATORS

70% of educators
trained teach at
Title 1 schools

APRIL 2020



It started with a call from the San Francisco Federal Reserve Bank letting the CCEE team know that they would be unable to accommodate our annual Spring competitions given the COVID-19 outbreak. Shortly after, global shutdowns began just as CCEE's online qualifier tests for the National Economics Challenge and Personal Finance Challenge were being submitted by hundreds of students.

In order to honor the hard work and effort that students had invested into the preliminary online test, CCEE deftly adapted the competitions into virtual formats. Not long after, the CCEE family was able to reap the grand prize reward of pride when the California team went on to place first in the Personal Finance Challenge among over 9,000 students from across the country.

MAY 2020



TEACHER SPOTLIGHT PERSONAL FINANCE CHALLENGE

CALIFORNIA STUDENTS WIN \$10,000 IN NATIONAL CONTEST



Teacher Anthony Raffetto, a long-time partner with CCEE, and co-teacher Janet Armstrong turned to CCEE to execute the 2020 California Personal Finance Challenge. Their students had already taken the qualifying tests for the contest. And while other contests were either completely cancelled or tepidly moved online, CCEE moved it online in less than a month. "[CCEE] was the only competition that maintained the competitive feel to it by involving a live aspect," said teacher Anthony Raffetto, "my students got a lot of that competition."

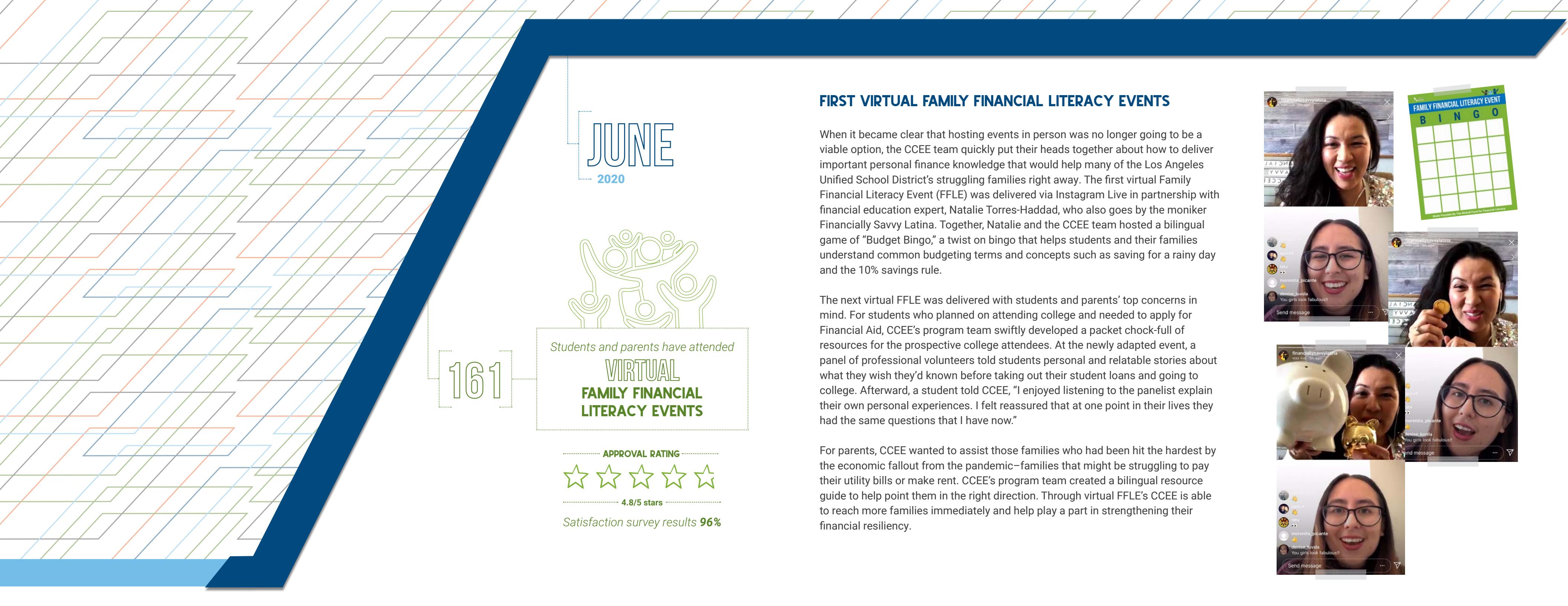
The Personal Finance Challenge provides students with experiential learning at no cost. Students are assigned a "case study" detailing a fictional financial situation. They are tasked with preparing personal financial recommendations to a panel of judges. Students demonstrate their knowledge of personal finance with others across the state and nation. Anthony's comments of gratitude sum it up:

"The team last night got on Zoom and reflected on the whole process. The experience they had was phenomenal. We had one student who did not know the difference between a bond and a mutual fund at the beginning when we started to prepare back in the fall. Yesterday he was a contributing member for a team that had to make a 15 minute presentation and survive a 15 minute question and answer period in national finals. The experiences they shared last night confirmed that my suspicion that programs like yours are far more powerful than most anything you could teach in a classroom is correct."

Students Jonathan Chang, Shaunk Kale, Shivaansh Kapoor, and Pratinav Sharma went on the sweep both the state competition **and** the national competition by winning both the California and National Personal Finance Challenges. The total in grand prize winnings was \$11,500. When asked what they would do with their earnings, Jonathan replied, "Give a portion to my mom to help her out with bills."

OVER
4
YEARS

High school business educator, **ANTHONY RAFFETTO** has brought
OVER 80 STUDENTS
to **CCEE'S PERSONAL FINANCE CHALLENGE AND FINANCIAL ADVISORS CHALLENGE**



Between
2015 & 2020

CCEE WILL HAVE IMPACTED
546,932
STUDENTS

In 2019-2020, CCEE educated a total of:

1,153
EDUCATORS

116,221
STUDENTS

53
FAMILIES



& is on track to reach
ONE MILLION
STUDENTS BY THE END OF 2021



LOOKING AHEAD

TEACHER PROGRAMMING ACROSS ALL GRADE LEVELS

*Introducing \$martPath and Never Too Young:
Virtual Edition*

CCEE is committed to filling in the gaps for California's K-12 students by delivering programming that serves elementary, middle, and high school educators, in order to reach students at every single grade level. In the upcoming year, CCEE will begin issuing stipends to educators who take part in training for the \$martPath program—a free, interactive virtual learning platform that helps students learn economics and personal finance.

Additionally, the CCEE Programs team has worked diligently with after-school providers to adapt the Never Too Young program to accommodate distance learning, both synchronously and asynchronously, to ensure that elementary students are still able to get a head start on becoming economically and financially literate.

By integrating these grade-band-specific offerings into CCEE's core programs, students as young as 7-years-old will begin learning about how to save and how to make decisions to create a brighter economic future for all.

ADVANCING ECONOMIC MOBILITY FOR COMMUNITIES OF COLOR

Advancing BIPOC Economic Equity Initiative

California's K-12 students and their families need to learn how to become economically and financially literate now more than ever before. The pandemic and its economic fallout further exacerbate already existing racial inequalities for California's students, most of whom are Black, Indigenous, People of Color (BIPOC). Research shows that BIPOC students are the most likely to be severely harmed by the lack of financial and economic education.

The Advancing BIPOC Economic Equity Initiative builds upon CCEE's existing mission with a renewed focus specifically on combating racial economic inequality. In the upcoming years, CCEE plans on increasing its services and support to more Title I schools in historically underserved regions, as well as increasing the number of BIPOC educators who participate in CCEE's programs. Through robust economic education, the Initiative's actions will result in increased economic mobility and resilience for BIPOC students and their families throughout California.

MEETING TEACHERS WHERE THEY'RE AT

Virtual-First Programming

The global pandemic has created a new reality, full of uncharted territory—especially for K-12 schools and communities. As the world continues to navigate its way throughout this foreign environment, CCEE wants to be sure that the lives of California's teachers and students are still being changed by economic and personal finance education. In the upcoming years, CCEE will deliver its programming to educators, students, and their families with a digital-first focus in mind.

When we meet our teachers where they are at, their students have access to critical, life-changing experiences. CCEE is committing its efforts to adapting any existing and new programs into engaging virtual formats and ensuring that its content is accessible to the most challenged of learners.

Together, we will make it through this tunnel of uncertainty to the other side, better than when we first entered it!

FINANCIALS

Amount fundraised by year

2015-2016 **\$616,127**



2018-2019 **\$1,260,487**

2016-2017 **\$1,385,805**



2017-2018 **\$684,075**



2019-2020 **\$830,804**

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"My motivation for dedicating my time to the California Council on Economic Education is because I believe the leaders of tomorrow should be learning about personal finance and economics in school. Together with teachers, this organization is changing lives, one classroom at a time."

Karen Anderson

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\$1,000,000+

John F. and Patty Nickoll

\$250,000+

American Honda Finance
Corporation Visa-MC Cy Pres
Settlement Funds

\$50,000- 99,999

CIT Bank
MUFG Union Bank
B of A Consumer Education
Endowment Fund: The San Francisco Foundation

\$25,000- 49,999

Bank of America
CFA Society of Los Angeles Incorp

Chevron Products Co
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\$10,000- 24,999

Barry Patmore

Cathay Bank

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The Green Foundation

US Bank

US Bank Foundation

\$5,000- 9,999

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\$1,000- 4,999

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Morck Financial & Insurance

Keith Drake

Services

Kevin Thompson

Nebraska Council on Economic

Education

Nelson Yuan

United Way

Nivia Alvarado

Kristine Acosta

Noreen Kane

Kristine Rodriguez

Norman Cerswell

Orange County Department of

Education

Kyung H. Park

Laurie Hailer-O'Keefe

Leah Nanni

Lesley Mace

Lemuel Daniels

Linda Beaven

Lisa Robertson

Liz Karr Pola

Robert Bonifacio

Robert Delfino

Ronald Reed

Rosemary Sajak

Sanath Dias

Sandra Flores

Scott Iliff

Sean Reed

Selinda Molloy Neal

Shannon Quinn

Shaun Black

Sharon Thomas

Stela Oliveira

Susan Flavin

Susie Norris

Suzanne Gonzalez

Tami Compton

Todd Henderson

Tye Jackson

Virna Lisa McCloskey

Wendy Kwong

CCEE STAFF



ARIANA DIAZ

Program Coordinator

Ariana Diaz got her degree from Cal State University, Fullerton. During her undergrad, she had the privilege of interning with the National Coalition for the Homeless in Washington D.C., where she conducted outreach programs designed to educate others on gentrification, Section 8 housing, and breaking the negative stigma associated with the homeless population. After college she set off to Austin, Texas where she spent time working with children and teenagers creating college prep and personal finance programs.



DENISE GUTIERREZ

President and CEO

Denise Gutierrez began her educational journey at Chaffey Community College. She is the mother of four wonderful children. Denise went on to achieve a Bachelor of Arts degree in Sociology and a Master's degree in Leadership and Management from the University of La Verne. As the youngest of five children from El Sereno, California and someone who is the first in her family to earn a college degree, she is deeply committed to being of service to her community.



AITZA GUTIERREZ VELAZCO

Social Media Intern

Aitza Gutierrez Velazco is a Mexican-American Communication Studies student currently enrolled in San Diego Mesa College and formerly at San Francisco State University. She has recently joined the CCEE team as a Social Media Marketing Intern, building her work experience in marketing and expanding her communication skills. Aitza plans on utilizing social media in order to amplify young, diverse, and marginalized voices in order to create social change.



JOSHUA MITTON

Chief Programs Officer

After reading his first economics textbook in a single weekend, Joshua went on to obtain a B.A. in Applied Economics from Idaho State University. He relocated with his family to Southern California to pursue graduate studies at Cal State Fullerton, which he is due to complete this fall. During his time there he worked as a graduate assistant for the Center for Economic Education and gained a taste for expanding others' understanding of economic and personal finance principles and concepts as well as apply it in their lives to their own success.



RADHA BHATTACHARYA, PHD

Department of Economics, California State University, Fullerton

Dr. Bhattacharya has been a council director since 2011. She has been very active in carrying out the mission of the Center for Economic Education – partnering with U.S. Bank and Wells Fargo on several large projects over the course of her leadership and hosting annual Economics and Personal Finance Olympiad competitions for local high school students.



JANE LOPUS, PHD

Department of Economics, California State University, East Bay

Jane Lopus, PhD Director, is an accomplished researcher, curriculum writer, and international consultant. She has authored Economics in Action! as well as materials for the Council on Economic Education; She has been an integral part of bringing economics and personal finance education to many countries of the former soviet union.



LEXIE NGUYEN

Director of Marketing and Communications

Lexie is a vibrant communications and marketing specialist, with an emphasis on digital marketing. She is a Long Beach, California native who studied Political Science and International Relations at Florida International University in Miami, Florida. She has experience with international, state, and local nonprofit initiatives; political and labor campaigns; and expanded learning education and policy. She is a trained anti-racist facilitator and volunteers as a mentor with elementary, middle, and high school students.



JIM CHARKINS, PHD

Professor Emeritus, California State University, San Bernardino

Throughout Dr. Charkins career, he has lent his expertise to the campaign to pass of mandatory economics instruction at the high school level in the state of California, developed the MoneyWise Teen program, and has been a passionate advocate for K-12 economics instruction. He is a former executive director of CCEE and one of the instrumental founders of the California Association of School Economics Teachers (CASET).



ANTHONY ZAMBELLI, J.D

Department of Business and Professional Studies, Cuyamaca College

Dr. Zambelli has been an instructor in the Business and Professional Studies Department at Cuyamaca College since 1979. He is a recipient of the Cuyamaca College President's Award, the Award for Teaching Excellence and the Rainbow Award for service to the college community. He also received the Alfred Lord Whitehead Award for Teaching Excellence at the University of Redlands and was honored with CCEE's 2019 Excellence in Teaching Award.



CARMEN SOLORZANO

Operations Coordinator

Carmen Solorzano was born and raised in South Los Angeles for her entire life before moving to Northern California for college. She is a first-generation college graduate with a B.A. in Liberal Arts from California State University, East Bay. Her family is originally from El Salvador. She is passionate about the economics and personal finance programs that CCEE provides to K-12 schools and communities due to a desire to share valuable resources to communities like the one that she's a part of.



TYE JACKSON, PHD

College of Business and Economics, California State University, Los Angeles

Dr. Jackson is the Dean of the College of Business and Economics at Cal State LA. He holds undergraduate degrees in mathematics and economics from Morgan State University, a master's degree in economics from Yale University, and a master's degree in resource economics and a Ph.D. degree in marketing science and econometrics from the University of California at Berkeley.



