



**MISSION STATEMENT**

Empower the UM community to make informed financial choices and take action to improve their present and long-term financial well-being

## OVERVIEW OF KEY PROGRAMS & SERVICES

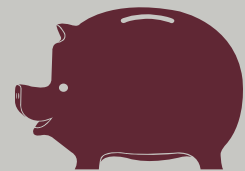
The FEP serves UM, Missoula College, and Bitterroot College students, employees, and alumni. We provide free workshops and one-on-one sessions to help students finance higher education. We promote student success by assisting with key areas of student financial wellness.



Apply for & Maintain Federal Student Aid



Navigate Loan Repayment & Forgiveness



Increase Personal Finance & Budgeting Skills

## KEY ACCOMPLISHMENTS & STUDENT FEEDBACK

"FEP helped me navigate the murky waters of student loan debt, public service loan forgiveness, and financial well being in general, clearly explaining the loan process and repayment options, which made my life a lot easier."

-Beverly, Alumna

"The remote appointment greatly met my expectations. Given the circumstances, I enjoyed screen sharing capabilities which allowed me to watch [staff] set up an example budget and write out my financial goals."

-Kendall, Online Student



For the fourth year in a row, LendEDU has acknowledged UM Financial Education among a list of the top 50 Financial Literacy Programs offered at colleges and universities across the United States for 2020.

# ANNUAL ASSESSMENT

In Academic Year 2019/2020 the Financial Education Program served 3,539 UM students, employees and alumni. Our team expanded online services to UM affiliate campuses and prospective students in area high schools. The FEP staff improved outreach while continuing to offer workshops and individual appointment services. In 2019/2020 we increased our social media community by 188 followers and forged new partnerships with UM colleagues, high school counselors, and community organizations.

## STUDENT SERVICES

**3539**

TOTAL STUDENTS SERVED

**420**

INDIVIDUAL APPOINTMENTS

**98**

PRESENTATIONS

## PRESENTATIONS

**3119**

STUDENTS REACHED

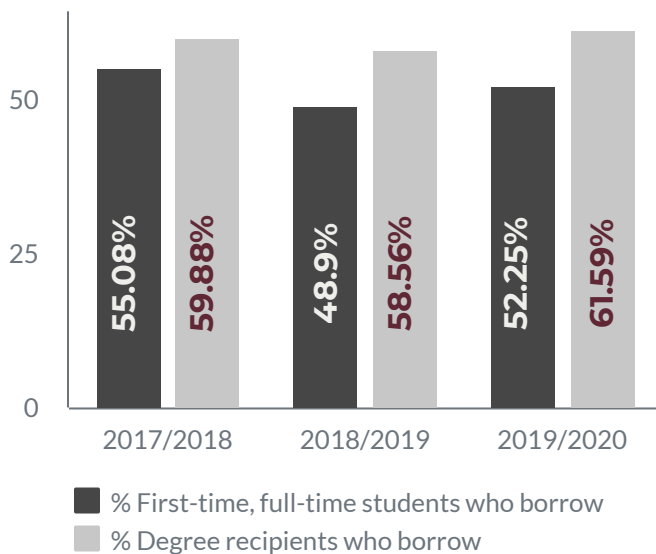
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PRESENTATION ATTENDEES

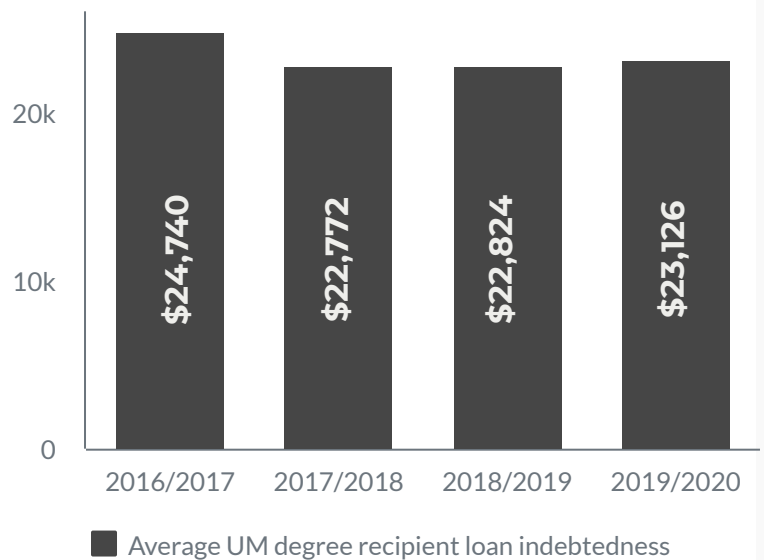
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ONLINE WORKSHOP VIEWERS

Percentage of first-time, full-time students who borrow and percentage of degree recipients who borrow



Average student loan indebtedness for degree recipient



## GOALS FOR 2020/2021 ACADEMIC YEAR



**Deliver College Readiness Program in High Schools**

Execute grant-funded, Money Matters program to educate area high schoolers on financing higher education



**Increase Online & Remote Education**

Provide greater options for remote access to FEP workshops and individual appointments



**Coordinate FAFSA Application Assistance**

Work with Financial Aid Office to create comprehensive calendar of FAFSA assistance and resources