

### Financial Education for the Public



**328** public-facing financial education workshops



**13,872** total participants

### Trainings for Practitioners



**31** train-the-trainer workshops

**445** human services practitioners trained



Federal Returns Filed

**5,000**

**15,500**



Volunteer Tax Preparers

**181**

**334**



Volunteer Hours

**2,246**

**24,564**



Federal & State Refunds

**\$10 million**

**\$24 million**



Tax Prep Fees Saved

**\$1 million**

**\$3 million**

### Financial Coaching & Financial Planning Programs

**80**

People received free financial coaching or planning services

**245**

Sessions with a Certified Financial Planner® or a Trust Plus™ Financial Coach

**75%**

Of coaching clients increased their credit score by an average of 38 points and reduced debt by \$2,827



**4 out of 5**

clients raised their credit scores in 6 months

### Benefits Access



**198 households** screened for public benefits  
**\$169,780** in benefits

### Capacity Building



**3,759** Participants reached through events

# Advocacy & Legislative Highlights

**21** Bills Supported

**103** Bills Tracked

Additional **\$404 million** in COVID relief through tax credits:

**\$177 million** to EITC recipients through a one-time stimulus payment

**\$160 million** to Maryland families through the expansion of MD's EITC

**\$66 million** to ITIN filers who've been left out of EITC & federal relief

**\$1 million** to families with children with disabilities through the CTC

Saving Maryland over **\$7million** by strengthening the Maryland **Save4College** program

CASH supported legislation to end the abuse of the Save4College program to ensure more low-to-moderate income families can participate and save for future higher education costs



## Impact & Special Initiatives



### Bmore CoLab

The Bmore CoLab is a nonprofit collaboration space that provides a variety of services to small businesses and entrepreneurs with the goal of **empowering entrepreneurship and financial well-being in Baltimore, MD.**

**21** small businesses and entrepreneurs received tax assistance and attended financial education events at the Bmore CoLab.



### Financial Navigation

The Financial Navigator program was created in response to the COVID-19 pandemic. CASH has partnered with **Baltimore County government** to help residents navigate financial hardship and disruptions.

**3,400** referrals have been made for *Baltimore Co.* residents

**780** total sessions



### Bank On Maryland

Bank On MD provides all Marylanders equal access to safe, inexpensive and certified bank accounts.

Launched the **Bank On website**

**2** new banking partners, **M&T Bank & PNC Bank**

**1** new partnership with **MD Department of Labor** to offer the option to direct deposit unemployment income