Volunteers drive Ladder Up’s programs, donating over 22,000 hours of service each year in skilled roles that engage directly with our clients. By training and mobilizing volunteer tax preparers, tax site specialists, pro bono clinic volunteers, and FAFSA and financial coaches, Ladder Up achieves a level of programmatic scale far beyond what could be accomplished with staff alone.

Our volunteers come to us from many different backgrounds. Together, they share their time and commitment with our clients. Spend any time watching volunteers in action, and you will witness the energy, compassion, and seriousness each brings to their role.

We want to shine a light on all our volunteers, each of whom is named in this newsletter. We are so incredibly thankful for each individual and organization that joins with us in our mission to serve low-income taxpayers.

We also recognize two stand-out volunteers honored this summer:

**Tim Hunter** received this year’s Julia F Kelly Award for his incredible level of dedication. Mr. Hunter has volunteered for over 13 years, serving in both city and suburban locations as a Quality Reviewer.

**Miyoshia Bailey** is the inaugural recipient of the New Volunteer Award. Ms. Bailey volunteers as Site Support for Harold Washington Library.

The President’s Volunteer Service Award honors individuals whose service positively impacts communities, and inspires those around them to take action, too. These recipients are listed in boldface type and each volunteer who donated over 30 hours of service is identified with an asterisk on the following page.

Thank you to all our volunteers!
Ladder Up Volunteers continued from page 1

On average, a single TAP volunteer helps generate a total of $54,270 in refunds and returns during the tax season!

Our TAP and Clinic volunteers contributed over 22,901 hours of service last year.

“A our clients light up in appreciation when I take the time to explain everything.” — Russell, TAP Volunteer

“Asher Mayerson
Kayley McNamich
Caitlin McAuliffe
Steve McClary*
McDermott Will & Emory*
John McDermott
David McEvlin*
Jimmie McGhee
Matthew McGrath
Kayleyn McCroath*
Jim McGuire
Linda McGuire
Clarke McGuire
James McGlaun
Jeffrey Medchill
Amanda Meh
Faeron Meldrum-Taylor

“Helped a family who ended up getting a unexpectedly large refund.” — Chan-Yu, Board Member and TAP Volunteer

Our TAP and Volunteer delivered over $72K in legal assistance to our clients, receiving taxpayers of over $475K in debt and payments owed.

“A our volunteer time translates into real dollars for our clients—money that makes a significant impact relative to their overall income.” — Roxanne, TAP Volunteer

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“Bolded names denotes President’s Volunteer Service Award; * denotes 30+ hours of service

Maciej Bien
Robert Bills
Lindsey Blum*
Thomas Blythe Reske
Pamela Bonsol
Tom Borders
Michael Bosie
Deidra Bourne
Erica Bourquin
Caroline Brain
Julie Brandt
Matthew Brandys
Mollie Brien
Justin Brinker
Lindsey Bristow
Kirby Bruzek*
Katherine Bryan
Suzann Campbell
Karen Campbell
Cindy Carter*
Karen Carter*
Rocio Castillo

Jennifer Mendiola
Julie Merz
Ilse Messner*
Mallory Mills
Aiyu Min*
Zenaida Miranda
John Mitchell
Kelvin Montgomery
Diane Morgenthal
Sushil Morker
Franklin Moy*
Mary Murphy
Ryan Murphy
Robert Murphy
Carson Myers*
Pete Nagy
Karen Naranjo
Cassandra Neal*
Donald Nelson
Volha Nepap
Andre Nguyen
Thuan Nguyen
Dan Nguyen
Elizabeth Noll*
Maureen O'Brien
Tybet Oikhuure

Max Ramirez
Cameron Randle
Dolecules Raygoza
Karren Reinschpenger
Shawn Renchindorg
Jillian Rice
William Ringhofer*
Andy Roberson*
Julio Romero
Yue Ru
Nahtash
Rudarakanchara
Martin Rue
Ruth Runberg*
Cindy Ryan
Samira Sair
Stefany Samp
Ake Snarels
Christian Sanchez
Nicholas Santos
Shani Schindler
Daniel Schwager
Tom Scott
Scott Sheehan
Scott Shermtaro*
Debbie Shi

Lisa Trost
Nick Tsagalis
James Tudor*
William Tyler, Jr*
Samuel Vadasseri*
Lauren Valenta
Ryan VanZuiden
Iris Vargas*
Alifya Vasi
Christian Villalobos
Madhu Sudhana Rao
Vutukuri
Pamela Wafford
James Wagner
Terence Wagner
Lisa Wallsen
Burt Walker*
Patricia Walsh
Chan-Yu Wang
Lonnie Washington
Joi Washington
Kathy Wassmann*
Penny Wegman
Ivy Wei*
Robert White
Molly Whitlock

Jeff Holdvogt
Robin Horton
Elizabeth Houlihan
Russell Howland
Kyaw Htike
Jessica Huang

George Martinez
Margaret Masier
Brandon Matthews
Melissa Mau
David May*
Mayer Brown*

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Yvette Christmas*
Anna Chronis
Edmund Chung
Kara Chyung
Jillian Cordes
Lisa Corish

Karen Okwu
Abisola Oladigbo
James Olsen
Ashley Olson
Ashley Olson*
Michelle Olera
Sean O'Malley
Gina O'Rand
Michael Pabian*
Philip Pace*
Mackenzie Packard
Matt Padberg
Devannda Patel
Don Patron
Lorena Pena

Gina Shin
Nancy Shocket*
Brian Shoup*
Jake Smalling
Kyle Smith
Christine Smith*
Willibol Soltis*
Alexander Soloes*
Brandon Sommer
William Spears
Matthew Staman
Mark Staub
Mia Staub
Paul Steger
Michael Wilhelm
Wayne Williams
Mark Wisthuff*
Jane Wolf
Aline Wong
Xianglian Xiao
Mohsin Yafai
Garrett Yu*
Yuria Yusa
Shahzor Zainulabadin
Kelly Zegler
Zhiyang Zheng
Teresa Zhu
Adriel Zupances

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Partner Spotlight: Hospitality Trainees Gain Real-life Skills for Financial Success

UNITE HERE Chicago Hospitality Institute, or UHCHI, is one of Ladder Up’s newer partners. UHCHI is the first US Department of Labor-certified apprenticeship program that trains individuals for employment in the unionized hospitality industry in Chicago.

UHCHI helps place their apprentice program “Completers” into unionized positions at area hotels, restaurants, and event venues, helping those businesses fill open positions. Employers say because UCHI completers are so well prepared, they spend less money and time on-boarding the new employees. Sounds like a win!

“Howver,” warns UHCHI Executive Director Sheryl Morris, “while they may earn a higher hourly rate than before, many don’t know how to make their money work for them.” One of UHCHI’s goals is to ensure that Completers do not become or remain “working poor” due to lack of personal finance skills.

This is where the partnership with Ladder Up comes in. Our FINCAP programming—covering Budgeting Basics, Credit Scores, and Understanding Employment Onboarding—helps prepare participants to enter the workforce on the right financial footing. Together, UHCHI and Ladder Up continue to improve the economic stability of many Chicagoans.

Morris hopes to expand what Ladder Up delivers to trainees, and says of the Ladder Up partnership, “It is a great fit – both of our organizations want to see people succeed.”

BY THE NUMBERS: Fiscal Year 2023 Goals

**TAX ASSISTANCE PROGRAM**

- **$24M** Refunds
- **13.2K+** Returns
- **18K+** Individuals
- **28K** Volunteer Hours

**TAX CLINIC**

- **121** New Cases
- **519** Consultations
- **$550K+** Saved

**FINCAP PROGRAMS**

- **2,500** College Success Clients
- **1,500** FINCAP Clients
- **1,500** General Sessions
Volunteer Spotlight
Tom Scott—TAP and Tax Clinic Volunteer

We continue to feature our volunteers for the superb work they do. We think you will be as inspired by them as we are!

For over 13 years—during which time he completed over 5,500 tax returns—Tom Scott has been a dedicated and passionate volunteer with Ladder Up. For Tom, a retired actuary who loves numbers and finds the tax system endlessly fascinating, Ladder Up is a perfect fit. “Ladder Up allows me to take my passion for numbers and help those in need,” recalls Tom.

I feel like the luckiest guy in the world to make this kind of impact.

As a volunteer with both our Tax Assistance Program and Tax Clinic, Tom says he sees firsthand the results we deliver for our clients. “I am able to gain the trust of our clients, and see what difference it makes in their lives,” he said.

Tom and his wife Maryellen are also long-time financial supporters of Ladder Up. Tom tells us he thinks Ladder Up is an “amazingly cost-effective organization that realizes the most value for every dollar donated.”

Although many of his retiree friends go to warm places like Florida for the winter, Tom says he is happy to spend winter in places like the Pullman and Hermosa neighborhoods, where he can help people gain stronger financial footing. “I feel like the luckiest guy in the world to be able to make this kind of impact,” Tom reflected.

Helping Make College Dreams a Reality

A college education is linked to higher pay, upward mobility, improved health outcomes, and greater civic involvement. But funding college continues to be a barrier to many, especially Ladder Up clients who are often first-generation students with neither the funds nor experience needed to make college dreams a reality.

The Ladder Up College Success Track program provides essential support to prospective and returning students to help make college financially feasible:

- **General Information Sessions** cover finding and applying for financial aid, including the Free Application for Federal Student Aid (FAFSA) or Alternative Application (for those without a Social Security Number).

- **Financial Aid Completion Sessions** coach students through the FAFSA or Alternative Application, helping students avoid missteps that may cause reduced or denied aid.

- **Understanding Student Loans & Award Letters and Managing Your College Finances Workshops** help students interpret the true cost of college attendance.

Our 2021 FAFSA applicants received over $21M for college

“Ladder Up firmly believes that if a college education is the right next step,” says Executive Director Phyllis Cavallone, “then we help our clients accomplish their goal with the least amount of debt possible.”

For more information about our College Success Track, check out our website: [goladderup.org/financial-aid-for-college](goladderup.org/financial-aid-for-college).
Annual Tee Up Golf Outing—A Success by Any Measure

Our Annual Tee Up Golf Outing found a sold out crowd of supporters enjoying a picture-perfect day at Riverside Golf Club in support of Ladder Up and our Tax Assistance Program. Thank you to our Advisory Board, all who joined in the fun, and to those who supported this event from afar. Together, we raised almost $110,000!
UPCOMING EVENTS

Giving Tuesday
November 29th, Ladder Up invites our friends to join in the Global Day of Giving.

LEARN MORE ABOUT VOLUNTEERING WITH LADDER UP!

Interested in becoming a volunteer with Ladder Up? We would love to tell you more about our many rewarding volunteer opportunities!

Go to our website at goladderup.org/volunteer or scan below to learn more about volunteer positions available, training schedules and more!