

LADDER UP^{date}



Ladder Up Volunteers Deliver Results for Clients

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!

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Ladder Up Volunteers continued from page 1

Jennifer Aaron	Samantha Crane	Margaret Hughitt*
Robert Agler	Maria Critelli	Nina Hunter
Ilhan Ahmed	Joann Curtis*	Tim Hunter
Delia Alvarez	Grant Davidson*	A s m Huq
Jack Amaro	Lauren DiGrazia	Sharon Hurwitz*
Tea Ambo	Cathleen Dixon*	Arlene Hybl
Daniel Ampon	Tuan Do*	Rana Jaber*
Matthew Anderson	Kathleen Donahue*	Shira Jacobson*
Glenna Anderson*	Trish Dredze*	William Johnson

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

Kirsten Anderson*	Laura D'Souza*	Christian Junus
Brianna Andress	Yu Du	Andrew Kach
Judith Andringa	Olga Edds	Tram Kantor
Jose Anguiano*	Loraine Edwalds*	Katherine Karnosh*
Adam Ansari	Tuya Enkhbayar	Prashanth Karri
Aharon Appleton	Taylor Etzell*	Robert Kaylor*
Anthony Ash	Wanda Evison*	Collin Kebo*
Jenny Austin	Donald Faems	Alex Keller
Rasheedah Badru*	Deborah Farmer	Steve Kelliher*
Miyoshia Bailey	Glenn Ferencz	Thomas Kelly*
Rita Barksdale	Paula Fernandez	Kironyo Kiarie
Hannah Barlow	Susan Filer	Roe Kim
Tracy Barnard*	James Fischer	Cheryl King
Christopher Barretta	Eric Flanders*	Kirkland & Ellis*
Risikat Baruwa	Tom Frey*	Bruce Klink
Sophie Battaglia	Daniel Fuglestad	Noah Korn
Dylan Bellisle	Justin Gallagher	JoAnn Kress
Maria Bello	Martha Ceppert*	Mandar Kulkarni*
Brett Bendokaitis*	Ryan Gibbons	Barbara Kwak
Myriem Bennani	Anne Giffels*	Catherine Lake
Emily Berg	Assata Gilmore	Dan Latona
David Bernhardt	Joshua Glavanovits	Phu Le
Julie Berthold*	Adrianna Gonzalez	Daria Lebedeva
Bizunesh Beyene	Angelica Gonzalez	Joyce Lee
Michael Bichimer*	Maury Goodman	Leanne Lee



"Our clients light up in appreciation when I take the time to explain everything." *Russell, TAP Volunteer*

Maciej Bien	Tim Gordon*	Hannah Lee
Robert Bills	Dianne Goren Radtke*	Sonia Lee
Lindsey Blum*	Mardel Graffy*	Sara LeProwse*
Thomas Blythe Reske	Evan Gray	Rachel Lewis
Pamela Bonsol	Rachel Gray	Michael Lewis
Tom Borders	Maureen Greene	Kelly Liang
Michael Bosie	Irene Gudino	Alexia Lipman*
Deidra Bourne	Elias Guerrero*	Lauren Livernois
Erica Bourquin	Andrew Guimond	Daniel Lovrich*
Caroline Brain	Juyeon Ha	Jessica Lowe
Julie Brandt	Cheryl Haack*	Ying Lu
Matthew Brandys	Michael Haas	Joseph Lyon
Mollie Brien	Ahmed Hamed	John Mahal*
Justin Brinker	Janet Hansen	Amy Mahan*
Lindsey Bristow	Melanie Harmon*	Miriam Mahovsky
Kirby Bruzek*	Stephanie Hebron	Payal Mallik
Katherine Bryan	Harvey Helfer	Dan Malone*
Suzann Campbell	Cliff Helfer	John Mann*
Karen Campbell	Bonnie Hemphill	Stephen Manning
Cindy Cao	Janet Hickerson*	Megan Mansfield*
Karen Carter*	Zeb Hill	Gabriel Marsal
Rocio Castillo	Heidi Hockberger	Kelly Martin

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

Yvette Christman*	Jeff Holdvogt	George Martinez
Anna Chronis	Robin Horton	Margaret Masier
Edmund Chung	Elizabeth Houlihan	Brandon Matthews
Kara Chung	Russell Howland	Melissa Mau
Jillian Cordes	Kyaw Htike	David May*
Lisa Corish	Jessica Huang	Mayer Brown*



"I helped a family who ended up getting an unexpectedly large refund." *Chan-Yu, Board Member and TAP Volunteer*

Asher Mayerson	Veronica Perez	Claire Stephens
Kayley McAninch	Hugo Perez Dorsey*	Aki Stepinska
Caitlin McAuliffe	Cristian Perez*	Laura Stoica*
Steve McClary*	Jessica Peters	Lidija Stojkovic
McDermott Will &	Zak Piech*	Megan Stoppelman
Emory*	Charles Pierret	Maria Stottlemeyer
John McDermott	Russell Pike	Jodi Sugar
David Mcelvain*	Caleb Pilukas	Lakshmi Sundaram
Jimmie McGhee	Hugh Pinkus*	Muthuswamy Sunder
Matthew McGrath	Sherry Podgorsky*	Ayaka Tamaishi
Kenneth McGrath*	Jeremy Poore*	Joseph Taylor*
Jim McGuire	Ellen Porter*	Ellen Porter
Linda McGuire	Brandon Potesta	Kyla Thomas
Clare McGuire*	Sean Pottow	William Thompson
James McLaughlin	Will Pretto*	Scott Thuk
Jeffrey Medchill	Elizabeth Pritchard	Angelie Thurmon
Amanda Mehr	Blake Quarrie	Jim Toomey
Faeron Meldrum-Taylor	Martin Quinn	Gorana Trifunov

Tax Clinic volunteers delivered over \$72K in legal assistance to our clients, relieving taxpayers of over \$475K in debt and payments owed.

Jennifer Mendiola	Max Ramirez	Lisa Trost
Julie Merz	Cameron Randle	Nick Tsagalis
Ilse Messner*	Domelica Raygoza	James Tudor*
Mallory Mills	Karin Reichensperger*	William Tyler, Jr*
Aiyu Min	Shawn Renchindorg	Samuel Vadasserial*
Zenaida Miranda	Jillian Rice	Lauren Valente
John Mitchell	William Ringhofer*	Ryan VanZuiden
Kelvin Montgomery	Andy Roberson*	Iris Vargas*
Diane Morgenthaler	Julio Romero	Alefiya Vasi
Sushil Morker	Yue Ru	Christian Villalobos
Franklin Moy*	Natthasit	Madhu Sudhana Rao
Mary Murphy	Rudarakanchana	Vutukuri
Ryan Murphy	Martin Rule	Pamela Wafford
Robert Murphy	Ruth Runeborg*	James Wagner
Carson Myers*	Cindy Ryan	Terrence Wagner
Pete Nagy	Samra Sair	Lisa Waisbren
Karen Naranjo	Stefany Samp	Burt Walker*
Caroline Neal*	Akeida Samuels*	Patricia Walsh
Donald Nelson	Christian Sanchez	Chan-Yu Wang
Volha Nepap	Nicholas Santos	Lonnie Washington
Andre Nguyen	Shari Schindler	Joi Washington
Tuan Nguyen	Daniel Schwager	Kathy Wassmann*
Dan Nguyen	Tom Scott	Penny Wegman
Elizabeth Noll*	Joseph Sheehan	Ivy Wei*
Maureen OBrien	Scott Shermetaro*	Robert White
Tybet Ohikhuare	Debbie Shi	Molly Whitlock



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

Karen Okwu	Gina Shin	Michael Wilhelm
Abisola Odigbo	Nancy Shocket*	Wayne Williams
James Olsen	Brian Shoup*	Mark Wisthuff*
Ashley Olson	Jake Smalling	Janie Wolf
Ashley Olson*	Kyle Smith	Alina Wong
Michelle Olvera	Christine Smith*	Xinglan Xiao
Sean O'Malley	Wilbert Solis*	Mohsin Yafai
Gina Orlando	Alexander Solis*	Garrett Yau*
Michael Pabian*	Brandon Sommer	Yuria Yuasa
Philip Pace*	William Spears	Shahzor Zainulabdin
Mackenzie Packard	Matthew Staman	Kelly Zegler
Matt Padberg	Mark Staub	Zhiyang Zheng
Devendra Patel	Mia Staub	Teresa Zhu
Don Patton		Adriel Zupances
Lorena Pena	Paul Steger	

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!

"However," 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

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.

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 first-hand 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.

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!



LADDER UP

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UPCOMING EVENTS

Giving Tuesday

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

The logo for Giving Tuesday features the word "GIVING" in a large, teal, sans-serif font. The letter "V" is replaced by a stylized icon of three hands reaching upwards, also in teal. Below "GIVING" is the word "TUESDAY" in a smaller, blue, sans-serif font. The entire logo is set against a white background with a thin teal horizontal line above and below it.

Ladder Up Tax Sites Open

January 28, 2023, TAP locations throughout Chicago area

Tax-a-Thon

February 4th, Olive Harvey College

15th Annual Casino Night

May 19, 2023, Chicago Cultural Center

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!

