



2025 ANNUAL STEWARDSHIP REPORT

**Deepening impact at the
Milgard School of Business
and UW Tacoma**



Message from the Dean



With sincere gratitude we present the Milgard School of Business annual stewardship report to Sound Credit Union for your generous support of the University of Washington Tacoma and the Milgard School of Business.

This year, we held campus-wide learning events for many students, delivered numerous finance classes using Bloomberg terminal data, inspired students to consider financial planning and saving money, fostered innovation through a Hackathon, celebrated the most successful Business Leadership Awards, provided life-changing scholarships, and helped to alleviate hunger on our campus. All thanks to Sound Credit Union's forward-thinking philanthropy. We have listed out these accomplishments in greater detail in the pages that follow and truly hope that it will give you a greater understanding of just how meaningful our partnership is.

It is especially of note that Sound Credit Union consistently lends its time, talent, and treasure for the benefit of our students. These key elements allow us to provide a superlative experience to our students, differentiating them in the job market - resulting in better jobs, and thereby transforming their lives.

Thank you once again,

ALTAF MERCHANT, Ph.D.
Gary E. and James A. Milgard Endowed Dean
Professor of Marketing
Milgard School of Business

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- CELEBRATION OF IMPACT
- CENTER FOR FINANCIAL WELLNESS
- HUSKY HACK HACKATHON
- MILGARD ETIQUETTE DINNER
- BUSINESS LEADERSHIP AWARDS
- UW TACOMA CAMPUS INITIATIVES



2025 ANNUAL STEWARDSHIP REPORT IS ONLINE!
LEARN MORE
tacoma.uw.edu/business/sound-credit-union

Impacting Lives Together



531+
Active participants across
16 Financial Wellness Workshops

\$18,000
Awarded to FinTech Entrepreneurs
at the Husky Hack Hackathon

13,750
Pounds of food distributed
to food-insecure students

Celebration of Impact Sound Credit Union

“ At Sound Credit Union, we believe that investing in University of Washington Tacoma and the Milgard School of Business means investing in the future of our region from supporting students and financial wellness initiatives to strengthening the broader community through leadership and partnership opportunities. We’re honored to work together to provide students with the tools and resources they need to manage their financial future, reflecting our commitment to investing in the communities we serve.

DON CLARK
President & CEO
Sound Credit Union

”



Center for Financial Wellness



Pictured:
Students learn about Bloomberg terminals
in the Financial Wellness & Markets Lab

Center for Financial Wellness

Empowering Students Through Bloomberg and the Student-Managed Investment Fund (SMIF)

Bloomberg Access for All

The Financial Wellness & Markets Lab has expanded its Bloomberg Terminal access to the entire campus, responding to strong interdisciplinary demand. The lab now opens daily to all students during the lunch hour, with trained student assistants available to help new users navigate the Bloomberg system.

This growth highlights both the popularity of Bloomberg among students and the lab's commitment to building financial literacy across disciplines.

14

Total student
lab assistants



Student-Managed Investment Fund (SMIF)

Students in the newly designed SMIF course series: TFIN 425, TFIN 426, and TFIN 490, now graduate with the Bloomberg Market Concepts (BMC) Certificate, equipping them with professional-level financial analysis skills.

In June 2025, the SMIF Board of Advisors approved the first student-proposed portfolio allocations, which are now actively tracked on Bloomberg. The portfolio's performance is continuously evaluated against its benchmark, and based on the analysis of economic and industry trends, students will propose a rebalancing plan to the board in December 2025.

These efforts mark an exciting stage in SMIF's formation, as students collaborate to develop the program's first Investment Policy Statement (IPS) as the guiding document for all future investment decisions.



FEI LENG, Ph.D., CFA, FRM
Associate Professor
Center for Financial Wellness



531

Participants Across
16 Workshops

30+

Student Cohort
Participants in TBUS 490

THE NEW FUNDING OPPORTUNITIES WILL ENABLE US TO EXPAND AND IMPROVE OUR EXISTING PROGRAMS

Thanks to the generous support from Sound Credit Union, the Center for Financial Wellness has experienced a year of growth, innovation, and sustainability. Together, we advanced the Milgard School of Business mission by empowering students, faculty, staff, and community members with accessible, high-impact financial education that fosters responsible decision-making and lifelong learning.

Through 16 Building Financial Confidence workshops, a new TBUS 490 Personal Finance course, and the launch of the Ask Dan Anything digital Q&A platform, we expanded financial literacy engagement across campus and beyond.

With over 500 attendees at in-person events and growing online participation, the Center of Financial Wellness continues to make financial confidence and inclusion a cornerstone of student success while building lasting connections with alumni and industry professionals.

Introducing Husky Hack

Sound Credit Union and University of Washington Tacoma Host Husky Hack Hackathon to Spark Financial Innovation



Sound Credit Union and the Milgard Center for Business Analytics at the University of Washington Tacoma launched HUSKY HACK, a 24-hour innovation challenge empowering college students from across Washington State to reimagine financial empowerment through technology.

Formerly known as the FinTech Challenge, Husky Hack brings together aspiring innovators, technologists, and entrepreneurs to design and pitch digital tools that help individuals take control of their finances. Students work individually or in teams to tackle real-world challenges using emerging technologies such as AI, blockchain, and data analytics.

Throughout the event, participants collaborate with mentors, industry professionals, and community leaders, gaining hands-on experience in innovation, teamwork, and problem-solving. Winning teams receive mentorship and funding to advance their projects, including a \$15,000 grand prize and a six-month CoMotion Labs membership, further strengthening Washington's growing fintech and innovation ecosystem.



\$18,000

Awarded to FinTech Entrepreneurs
at the Husky Hack Hackathon



JENNIFER REED

Vice President of Public Relations
Sound Credit Union

“Sound Credit Union is committed to connecting people with the financial tools and resources that help them to manage their finances confidently. Our partnership with the UW Tacoma provides an opportunity for entrepreneurs to channel their creativity into developing a tool that we hope will benefit our members and the community at large.”

Pictured:

A full class of students participates in the Investment Intelligence workshops

Milgard Etiquette Dinner

IN THE BUSINESS OF NETWORKING

On April 29, 2025, the Milgard Success Center hosted a perennial student favorite, the Etiquette Dinner, possible because of the generosity of community business supporters.

A special networking opportunity that brings together students and business leaders who sponsor tables, it's an evening that expands students' horizons, introducing the etiquette of business dining.

The Museum of Glass provided a stunning backdrop for all to enjoy an evening of business dining tips, great conversation, laughs, and amazing food. Sound Credit Union continues to be one of our biggest champions, sponsoring two tables and sharing their business expertise with engaged students, creating an unforgettable evening.

A heartfelt thanks to Sound Credit Union for your continued support and contributions to the Milgard School of Business.



The 2025 Annual Milgard School Business Etiquette Dinner

95
Attendees

2 Tables
Sponsored by SCU



The 2025 Annual
Business Leadership Awards

Together, we celebrated the leaders whose legacy of impact continues to shape the South Sound community for the better.

190
Attendees



Chris Walters
CEO, Gensco
BUSINESS LEADER OF THE YEAR



Larry and Virginia Gordon
Gordon Trucking and Gordon Truck Centers
LIFETIME ACHIEVEMENT AWARD



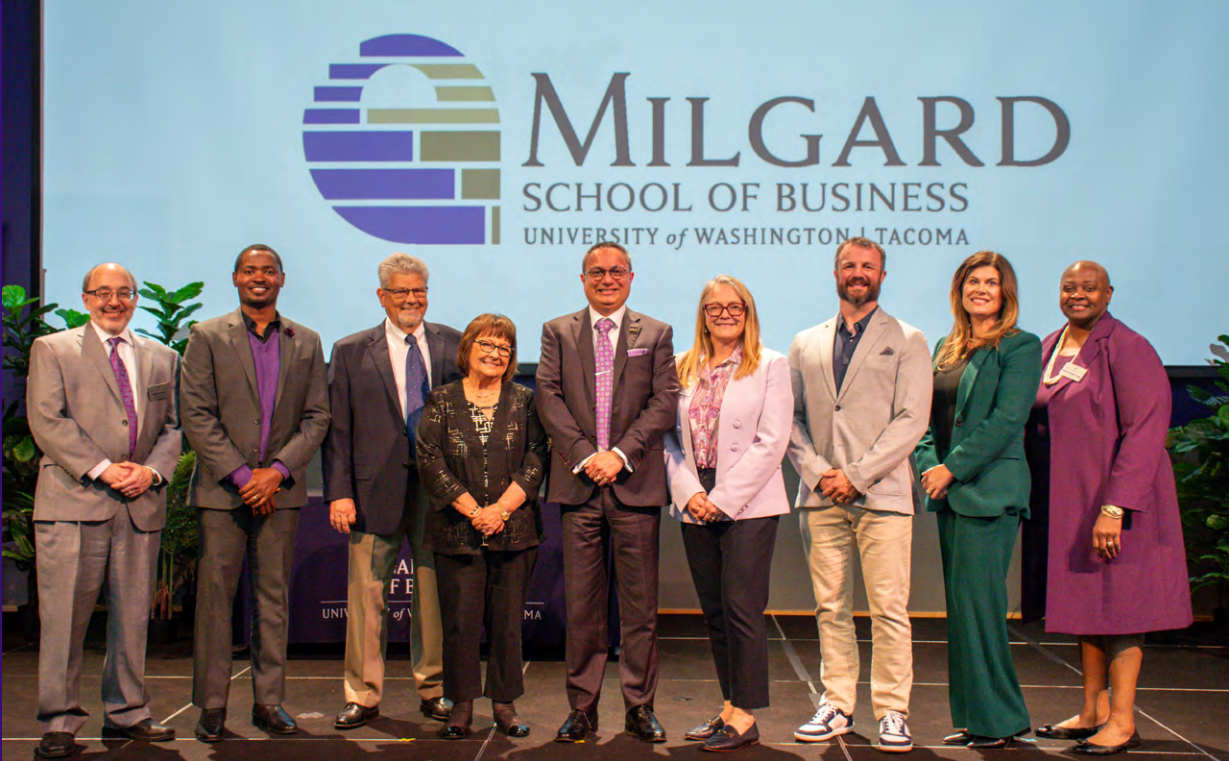
Bett Lucas
Senior VP Commercial, Seaport Sound Terminal
SUSTAINABLE BUSINESS LEADER OF THE YEAR



Jackie Flowers
CEO, Tacoma Public Utilities
WOMEN'S LEADERSHIP AWARD



Marquise Dixon
CEO, Degrees of Change
PATHFINDER LEADER OF THE YEAR



2025
The 23rd Annual
Business Leadership Awards

Thank you to our sponsors



On May 14, 2025, the 23rd Annual Business Leadership Awards brought together 190 attendees at the University of Washington Tacoma to celebrate the region’s most inspiring business and community leaders. The evening recognized individuals and organizations whose vision and integrity continue to strengthen the South Puget Sound through innovation, sustainability, education, and service.

Sound Credit Union’s continued partnership plays a vital role in supporting leadership development and student success at the Milgard School of Business, helping foster the next generation of ethical, community-minded business professionals.

Together, we celebrate the power of collaboration, integrity, and innovation that drive meaningful impact across our region.

UW Tacoma Campus Initiatives

FIRST GENERATION INITIATIVES

First Generation college students are those who identify as the first in their family to earn a Bachelor's degree. The First Gen Financial Wellness Cohort empowers these students to build confidence through essential financial wellness skills, including budgeting, saving, and personalized one-on-one financial coaching sessions.

During the 2024–2025 academic year, the program received 196 applications and supported 56 active participants, 92% of whom identified as first-generation students. This year, we incorporated point-in-time assessments of financial well-being using the Consumer Financial Protection Bureau's Financial Well-Being Scale, revealing an average 7-point increase in participants' financial confidence and literacy.

Since its launch in 2020, the cohort has served over 210 students and awarded more than \$35,900 in scholarships to which Sound Credit Union has contributed. The program continues to be recognized as a leading model for inclusive financial education, empowering first-generation students to take control of their financial futures and foster lifelong financial wellness.

FIRST GEN FELLOWS COHORT

17 Students
SPRING 24

20 Students
AUTUMN 24

36 Students
SPRING 25

FIRST GEN AT UW TACOMA



Office of First Gen established with Student Life

Joined NASPA First Gen Forward / First Scholars National Network

Began aligning with FCEM model

Launched Faculty Research Assistantships

Launched Internship Prep Cohort

92%

First Generation Participants

210

Cumulative Students Served Since 2020

\$35,910

Cumulative Scholarships Awarded Since 2020



What Our Students Say

"When I was homeless and had nothing, money never lasted. Now that I'm learning how to have a healthier relationship with money, I feel more confident in budgeting and understanding money management."

"With the guidance from Jefferson, Sound Outreach Financial Coach, I can now create my own budget and understand where my money goes, where it comes from, and what needs my attention."

"Budgeting, saving, and financial awareness are skills I now use daily. Before the cohort, I didn't understand the purpose of credit, but now I'm much more confident in how I manage my money."

Financial Literacy Scholarships

The Financial Literacy Scholarship, made possible through a generous donation from Sound Credit Union, supports the Milgard School of Business in promoting financial wellness on campus. The scholarship recognizes students whose videos show strong commitment to financial literacy and healthy money habits. Together, the Milgard School of Business and Sound Credit Union are helping students build the financial skills they need to succeed at UW Tacoma and beyond.

\$8,000

Awarded in Financial Literacy Scholarships



Pictured:
A full class of students participates in the Investment Challenge.



Click Here To Hear From Students!



Rodrigo Martinez
Master of Science in Business Analytics

Rodrigo Martinez shared how to spot and avoid financial scams by recognizing red flags like urgent or unsolicited messages, verifying sources, and letting unknown calls go to voicemail. He highlighted using scripts for clarity, ending suspicious communications, discussing safety with others, and educating younger generations to stay financially protected.



Amy Onishchenko
Bachelor of Arts in Business Administration

Amy Onishchenko emphasized the importance of managing money in college, saying, “I used to feel like a hamster on a wheel trying to manage my money, but three things really helped: creating a budget with spending and savings goals, using student discounts from places like Apple and Amazon, and renting textbooks to save money in the long run.”



Aashi Sharma
Master of Science in Business Analytics

Aashi Sharma explained that credit scores, ranging from 300 to 850, are key to financial health and borrowing power. She discussed how factors like payment history, credit utilization, and credit length affect scores. Sharma recommended using secured or student credit cards responsibly to build credit and avoiding late payments for long-term stability.



Jaden Tobar
Bachelor of Arts in Business Administration

Jaden Tobar encouraged students to take charge of their financial journey in his video about budgeting for college. By tracking income and expenses and applying simple tools like the 50-30-20 rule, he showed how anyone can gain confidence and achieve financial independence.

The Pantry at UW Tacoma

University of Washington Tacoma Pantry is helping hungry Huskies

With the generous support of Sound Credit Union, The Pantry continues to serve as a vital resource for the University of Washington Tacoma students, ensuring access to healthy food and basic needs items.

From August 2024 through June 2025, 4,681 students utilized The Pantry, receiving an estimated 13,750 pounds of food.

Sound Credit Union's support continues to make a lasting impact. Together, we're nourishing student success and building a caring campus community.

13,750

Pounds of Food Distributed

4,681

Visits by Food-Insecure Students

What Our Students Say

"The Pantry helped me throughout my time at the UW Tacoma. Having a welcoming place to pick up food when I needed it, made me feel supported and part of the UW Tacoma campus community."

"The UW Tacoma Pantry is the best I've visited in the area with consistent product choices, a welcoming atmosphere, and easy access when I need it."

"The Pantry helps me focus on school without worrying about where my next meal will come from. Thank you for the support throughout the year!"





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