




# Non-profit Financial Advisory Resources in San Francisco

Agency	Services	Contact and learn more!
<p><a href="#"><u>EKS (Earn It! Keep It! Save It!)</u></a></p> 	<ul style="list-style-type: none"> <li>● <b>Multilingual capabilities</b></li> <li>● <a href="#"><u>Multiple sites</u></a></li> <li>● <b>Free Tax help</b> <ul style="list-style-type: none"> <li>○ Free tax preparation to households earning less than \$56,000 a year</li> <li>○ Awareness of the Earned Income Tax Credit (EITC)</li> <li>○ Helping taxpayers avoid refund anticipation loans</li> </ul> </li> </ul>	<p><b>Website:</b> <a href="http://earnitkeepitsaveit.org/">http://earnitkeepitsaveit.org/</a></p> <p><b>Locations:</b> <a href="https://earnitkeepitsaveit.org/site-lists/">https://earnitkeepitsaveit.org/site-lists/</a></p> <p><b>Call:</b> 211 for a list of sites</p> <p><b>Email:</b> <a href="mailto:eks@uwba.org">eks@uwba.org</a></p>
<p><a href="#"><u>MAF (Mission Asset Fund)</u></a></p> 	<ul style="list-style-type: none"> <li>● <b>Multilingual Website</b></li> <li>● <b>Multilingual services</b> (Chinese, Spanish, English)</li> <li>● <b>Financial capability building</b> <ul style="list-style-type: none"> <li>○ Informational Videos</li> <li>○ Interactive mobile app</li> </ul> </li> <li>● <a href="#"><u>Lending Circles</u></a></li> <li>● <b>And More!</b></li> </ul>	<p><b>Website:</b> <a href="https://missionassetfund.org/programs/">https://missionassetfund.org/programs/</a></p> <p><b>Contact form:</b> <a href="https://missionassetfund.org/contact-us/">https://missionassetfund.org/contact-us/</a></p> <p><b>Email:</b> <a href="mailto:Programs@missionassetfund.org">Programs@missionassetfund.org</a></p>
<p><a href="#"><u>MEDA</u></a></p> 	<ul style="list-style-type: none"> <li>● <b>Bilingual</b> (Spanish &amp; English)</li> <li>● <a href="#"><u>Financial capability building</u></a></li> <li>● <a href="#"><u>Free Tax prep</u></a></li> <li>● <b>And More!</b></li> </ul>	<p><b>Website:</b> <a href="https://medasf.org/programs/">https://medasf.org/programs/</a></p> <p><b>Call:</b> (415) 282-3334 ext. 101</p> <p><b>Email:</b> <a href="mailto:financialed@medasf.org">financialed@medasf.org</a></p>

Office of Financial Empowerment



- **For individuals that live, work or receive services in San Francisco**
- [Finding a bank assistance](#)
  - Comparing banks
- [Free Financial Coaching](#)
  - Smart Money Coaching provides free, confidential, one-on-one, personalized financial guidance with a certified financial coach.
  - Smart Money Coaching has [locations](#) throughout San Francisco.
- [College savings](#)
- [“Know Your Rights” information](#)
- **And more!**

**Website:** <https://sfgov.org/ofe/>

**Call:** 311 (in San Francisco) or 415-701-2311

The Women’s Building




- [Bilingual capabilities](#) (Spanish & English)
- [Free Financial Coaching](#)
  - Smart Money Coaching provides free one-on-one financial coaching
- **Financial capability building**
  - Clients build an understanding for the U.S. financial system, create a household budget, open a free or low fee bank account, establish and increase their credit score, reduce debt, and increase savings.
- **Free copy of their credit report and develop a personalized financial action plan**
- **And More!**

**Website:**

<https://womensbuilding.org/programs/financial/>

**Appointments are available at the Community Resource Room on Wednesdays between 10am-6pm. To make an appointment, call 877-256-0073 or visit the Referral Desk in the CRR.**

<p><a href="#">Wu Yee</a></p> 	<ul style="list-style-type: none"> <li>● <b>Determining eligibility for public services</b> <ul style="list-style-type: none"> <li>○ CalFresh Program (Food Stamps), CalWorks, Medi-Cal for Children, Seniors, and Pregnant Women, PG&amp;E California Alternative Rates for Energy, San Francisco Recreation &amp; Park Family Account Program, San Francisco Public Utilities, San Francisco Working Families Credit, Paid Family Leave (PFL)</li> </ul> </li> <li>● <b>And More!</b></li> </ul>	<p><b>Website:</b> <a href="https://www.wuyee.org/public-benefits">https://www.wuyee.org/public-benefits</a></p>
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*Please note: First 5 San Francisco, in collaboration with the San Francisco Office of Early Care and Education, compiled this list of resources solely to aid interested CARES 2.0 recipients in research. The departments do not specifically endorse any of the agencies or services listed above nor does the lack of inclusion in the list represent the departments' opinion either for or against other financial services that may be available.*