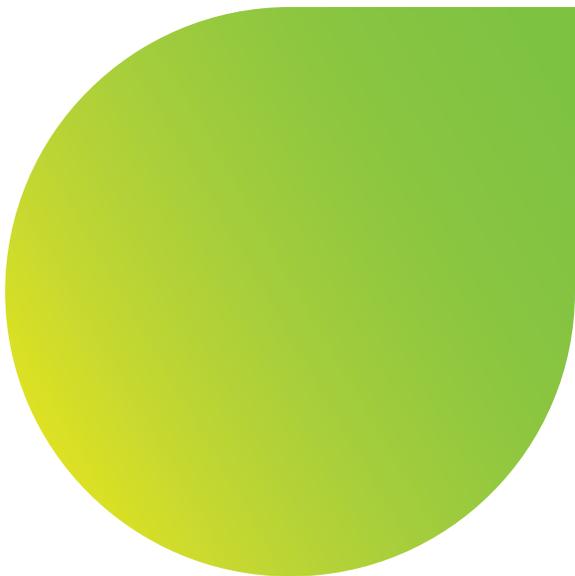




**2019**  
**2020**  
ANNUAL  
REPORT



**The**  
**Actuarial**  
FOUNDATION

# A MESSAGE FROM THE CHAIR

Dear Friends of the Foundation:

In the seventeen months that made up 2019 and the first part of 2020, The Actuarial Foundation proudly celebrated its 25th Anniversary and quickly pivoted to continue serving our stakeholders as the pandemic took hold. During unprecedented times, the Foundation staff, leadership, Board, and those we serve showed unprecedented commitment to continue the Foundation's mission of enhancing more lives with math education and financial literacy. From making our Math Motivators Tutoring Program available virtually, to hosting our first ever Virtual Modeling the Future Challenge Symposium, to finding ways to connect with our donors through virtual happy hours, our Foundation innovated and continued to thrive in the midst of a pandemic.



Clark Slipher

This Annual Report covers all of 2019 and the first five months of 2020 due to the change in the Foundation's fiscal year. Throughout this report are events and program milestones that shaped these seventeen months. Some highlights include:

- The Math Motivators tutoring program expanded from five to 20 cities. The number of volunteer tutors increased from 200 to more than 550. We've gone from helping 310 students in 6 high schools to more than 900 students in 40 middle schools and high schools.
- The Actuarial Diversity Scholarship reached an impressive milestone, awarding over \$1 million to almost 500 actuarial students, since its inception in 2009.
- Our middle school math competition, the Hardest Math Problem, was launched and over 6,000 students from all over the country submitted entries.
- Our *Building Your Future* financial literacy curriculum was updated and launched to over 60,000 high school teachers all over the country.
- The Foundation's 25<sup>th</sup> Anniversary celebration culminated with a luncheon with guest speaker, Dr. Talithia Williams and the kick-off of our *Educate.Connect.Change.* campaign.

Our strength and lasting success depend on the unique perspective and innovative spirit that each of us brings to The Actuarial Foundation. I am grateful to our individual and corporate supporters, our volunteers, our staff, and Board of Trustees for all that you make possible.

Looking through the pages of this Annual Report should make you proud and give you profound hope for a bright future for The Actuarial Foundation.

Sincerely,

Clark Slipher, FSA, MAAA  
Chairman

## Thank You, Volunteers!

The Foundation sends its highest appreciation to each and every person who gave of their time to support our mission and programs. We couldn't do it without you!

# 2019-2020 BOARD OF TRUSTEES

## 2019-2020 BOARD OF TRUSTEES

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## Supporting U.S. Actuarial Organizations

Since 2004, The Actuarial Foundation has received support from the U.S. actuarial organizations. Their trust and encouragement are key elements in the Foundation's growth and continued success as the U.S. philanthropic organization for the actuarial profession.

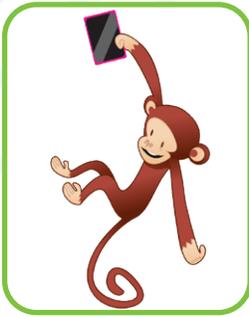


**Mission:** To enhance math education and financial literacy through the talents and resources of actuaries.

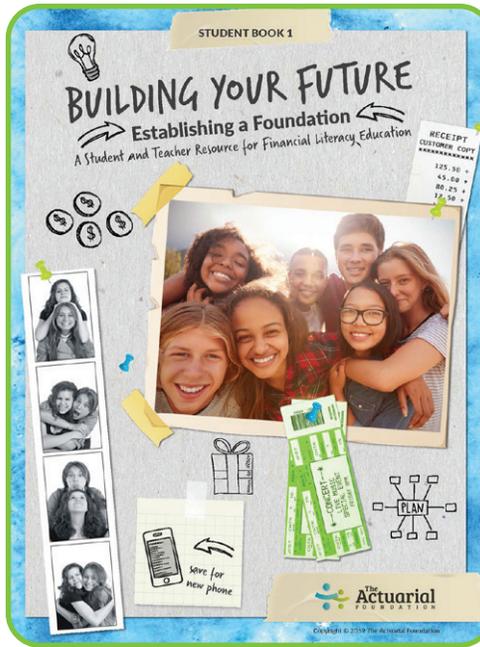
**Vision:** An educated public in pursuit of a secure financial future.

# WHAT YOU MADE POSSIBLE...

In its inaugural year, the Hardest Math Problem Student Contest garnered over 6,000 entries from students in grades 6-8 across the country!



Celebrated the Foundation's 25th Anniversary with a luncheon at the Society of Actuaries Annual Meeting.



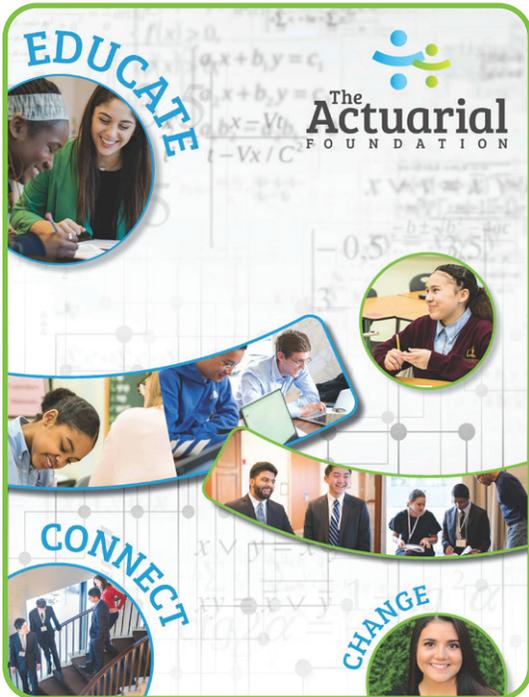
Launched the revamped *Building Your Future* financial literacy resource to 60,000 high school teachers.



Melonie Jackson was awarded the first Actuarial Promise Scholarship



The Foundation connected with supporters through its Back-to-School Virtual Happy Hour Program



The *Educate.Connect.Change.* Campaign launched with a goal of \$5 million to bring the Foundation's math programs to more students and engage more actuaries.



The second Modeling the Future Challenge Symposium was held in Chicago.



In the midst of the pandemic, the Math Motivators tutoring program pivoted to providing free, virtual math tutoring to underserved students.



Created the first-ever virtual Modeling the Future Challenge Symposium, which was a resounding success.

# FUNDING OUR MISSION

## BALANCE SHEET

	MAY 31, 2020	DECEMBER 31, 2018
<b>ASSETS</b>		
Cash and cash equivalents	\$ 1,175,147	497,415
Investments	6,023,412	5,636,752
Contributions receivable	1,928,638	396,451
Prepaid expense	30,382	7,995
Fixed assets	6,085	16,033
<b>Total Assets</b>	<b>\$ <u>9,163,664</u></b>	<b>\$ <u>6,554,646</u></b>
<b>LIABILITIES &amp; NET ASSETS</b>		
<b>Liabilities</b>		
Accounts payable	\$ 566,875	\$ 447,270
<b>Net Assets</b>		
Without Restrictions:		
Available for Operations	3,166,743	2,844,053
Board Designated	903,369	722,648
<b>Total Unrestricted</b>	<b>\$ <u>4,070,112</u></b>	<b>\$ <u>3,566,701</u></b>
Temporarily restricted	4,526,677	2,540,675
<b>Total Net Assets</b>	<b>\$ <u>8,596,789</u></b>	<b>\$ <u>6,107,376</u></b>
<b>Total Liabilities and Net Assets</b>	<b>\$ <u>9,163,664</u></b>	<b>\$ <u>6,554,646</u></b>

## STATEMENT OF ACTIVITIES

	SEVENTEEN MONTHS ENDED MAY 31, 2020			YEAR ENDED DECEMBER 31, 2018		
	Unrestricted	Temporarily Restricted	Total	Unrestricted	Temporarily Restricted	Total
<b>Revenues</b>						
*Contributions:						
Actuarial Organizations' Support	\$ 919,683	-	\$ 919,683	\$ 599,360	-	\$ 599,360
Annual Gifts	1,466,687	3,206,482	4,673,169	76,176	867,564	1,343,740
Other	2,359	6,975	9,334	18,993	-	18,993
Net assets released from restriction	1,332,592	(1,332,592)	-	678,011	(678,011)	-
<b>Total Revenues</b>	<b>3,721,321</b>	<b>(1,880,865)</b>	<b>\$5,602,186</b>	<b>1,772,540</b>	<b>(189,553)</b>	<b>\$1,962,093</b>
<b>Expenses</b>						
Program related expenses:						
Awards & Prizes	143,027	-	143,027	25,868	-	25,868
Education	1,755,797	-	1,755,797	847,555	-	847,555
Scholarships	360,994	-	360,994	211,035	-	211,035
<b>Total Program Related Expenses:</b>	<b>2,259,818</b>	<b>-</b>	<b>2,259,818</b>	<b>1,084,458</b>	<b>-</b>	<b>1,084,458</b>
Operating expenses:						
Fundraising	631,410	-	631,410	172,257	-	172,257
Administrative support	1,114,448	-	1,114,448	849,031	-	849,031
<b>Total Operating Expenses</b>	<b>1,745,858</b>	<b>-</b>	<b>\$ 1,745,858</b>	<b>1,021,288</b>	<b>-</b>	<b>\$ 1,021,288</b>
<b>Total Expenses</b>	<b>4,005,676</b>	<b>-</b>	<b>4,005,676</b>	<b>2,105,746</b>	<b>-</b>	<b>2,105,746</b>
Change in net assets before investment income	(248,335)	1,880,865	(1,596,510)	(333,206)	189,553	(143,653)
Invest Income Loss (Net)	(787,776)	(105,137)	(892,903)	(226,668)	(24,907)	(251,575)
Change in net assets	(503,874)	1,986,002	(2,489,413)	(559,874)	164,646	(395,228)
Net assets at:						
Beginning of year	\$ 3,566,701	2,540,675	6,107,376	\$ 4,126,575	2,376,029	6,502,604
<b>End of year</b>	<b>\$ <u>4,070,112</u></b>	<b>\$ <u>4,526,677</u></b>	<b>\$ <u>8,596,789</u></b>	<b>\$ <u>3,566,701</u></b>	<b>\$ <u>2,540,675</u></b>	<b>\$ <u>6,107,376</u></b>

# OUR DONORS MADE IMPACTS

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