



The
Actuarial
F O U N D A T I O N

2017

ANNUAL REPORT

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.

A MESSAGE FROM THE CHAIR

Dear Friends of the Foundation:

The Actuarial Foundation is committed to changing lives through math education and financial literacy. This commitment is showcased by the work the Foundation accomplished in 2017. To meet our goal of extending our reach, we have continued to expand our programs over the last year, creating more opportunities for the Foundation to serve the public and the profession. Here are just a few of the Foundation's 2017 highlights:



John Ehrhardt

- We unveiled the much-anticipated revamp of the Foundation's website. With its responsive design and revamped navigation, it is further proof of the Foundation's commitment to widening our audience and positioning ourselves as the innovative leader in math education and financial literacy.
- We initiated a more robust social media presence to attract the emerging generation of actuaries.
- We launched the **Modeling the Future Challenge**, our national math competition. Working with the Institute of Competition Sciences, a leader in challenge-based learning programs, this critical thinking, hands-on mathematics challenge is poised to become one of the premier academic competitions for high school students.
- We implemented our **Math Motivators** tutoring program in three high schools in Hartford, Connecticut and successfully expanded the program to one high school in Chicago, Illinois. As part of this expansion effort, we recruited over 100 corporate actuary and college volunteers in Hartford and Chicago.
- We promoted diversity and excellence in the profession by awarding 64 students with a Foundation scholarship.

Each of the strides we have made in fulfilling our mission to improve math and financial literacy were made because of you and your support. Whatever your role; volunteer, reviewer, content expert, presenter, donor, corporate partner; each of you is pivotal to the Foundation's success. On behalf of the Foundation's Board of Trustees and everyone who benefits from your generosity, we are profoundly grateful for all that you help to make possible.

I hope you enjoy this look back at The Actuarial Foundation's many successes of 2017 and that you will continue to join us in looking forward to the future.

Sincerely,

John Ehrhardt, FSA, EA, MAAA
2017 Chair

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.

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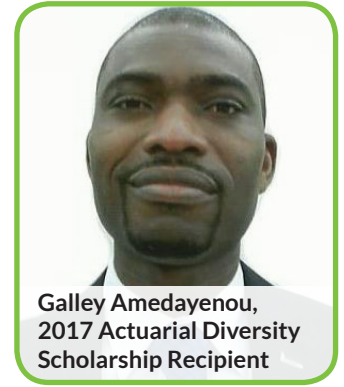
WHAT YOU MADE POSSIBLE...



Partnered with the Institute of Competition Sciences to design and implement the inaugural Modeling the Future Challenge on autonomous vehicles

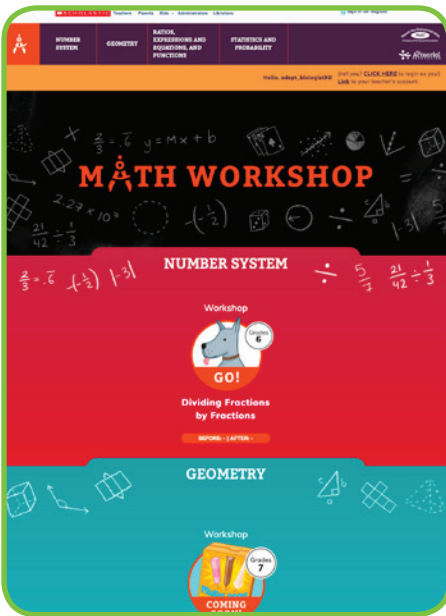


Implemented the Math Motivators tutoring program in three Hartford high schools and one Chicago high school



Galley Amedayenou, 2017 Actuarial Diversity Scholarship Recipient

Awarded 64 aspiring young people with a Foundation scholarship



Introduced *Math Workshop*, an online learning module for middle school teachers and students. *Math Workshop* is the latest release in the Expect the *Unexpected with Math*® series developed with Scholastic.



The Actuarial FOUNDATION

Implemented a new brand, including a redesigned logo and color palette

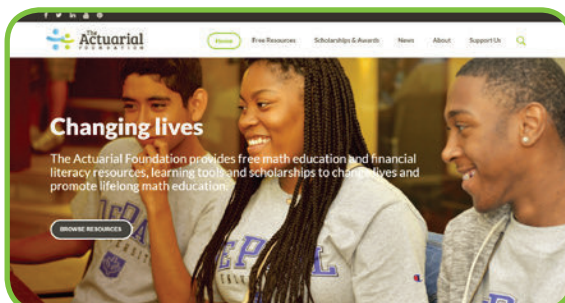


Launched a more robust social media platform



Raised over \$17,000 for the Actuarial Diversity Scholarship at the Ernst & Young sponsored luncheon at the SOA Meeting.

Unveiled a new website featuring responsive design and revamped navigation.



Actuaries donated \$60,000 to the Rebuild Math Classrooms effort to support schools affected by Hurricanes Harvey, Irma and Maria.

FUNDING OUR MISSION

BALANCE SHEET

ASSETS

Cash and cash equivalents	\$ 325,972
Investments	6,442,558
Contributions receivable	167,349
Prepaid expense	23,908
Fixed assets	22,989
Total Assets	\$ 6,982,766

LIABILITIES & NET ASSETS

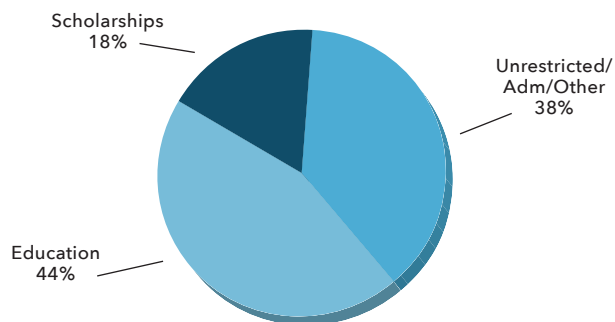
Liabilities

Accounts payable	\$ 480,162
Deferred revenue – sponsorships	
Total Liabilities	\$ 480,162

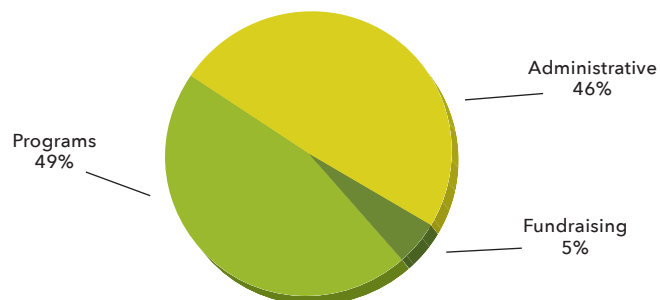
Net Assets

Unrestricted:	
Available for operations	3,343,700
Board designated	782,875
Total Unrestricted	\$ 4,126,575
Temporarily restricted	2,376,029
Total Net Assets	\$6,502,604
Total Liabilities and Net Assets	\$6,982,766

2017 Total Revenue



2017 Total Expenses



STATEMENT OF ACTIVITIES

	Unrestricted	Temporarily Restricted	Total
Revenues			
Contributions:			
Actuarial Organizations' Support	\$582,053	\$ -	\$582,053
Annual Gifts	420,250	445,046	895,296
Other	349	509	858
Net assets released from restrictions	558,549	(558,549)	
Total Revenues	\$ 1,591,201	\$ (112,994)	\$ 1,478,207
Expenses:			
Program related expenses:			
Awards & Prizes	29,580	-	29,580
Education	606,830	-	606,830
Scholarships	243,436	-	243,436
Total Program Related Expenses	\$879,846	-	\$879,846
Operating expenses:			
Fundraising	132,760	-	132,760
Administrative support	864,817	-	864,817
Total Expenses	\$1,877,423	-	\$1,877,423
Change in net assets before investment income	(286,222)	(112,994)	(399,216)
Investment Income	752,839	77,565	830,404
Change in net assets	466,617	(35,429)	431,188
Net assets at:			
Beginning of year	3,659,958	2,411,458	6,071,416
End of year	\$ 4,126,575	\$ 2,376,029	\$ 6,502,604

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