



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

2018 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 continued enhancing more lives with math education and financial literacy in 2018. Highlighted throughout this Annual Report are the events and impacts that shaped the past year and contributed to the success of teachers, students and the actuarial profession. Here are just a few highlights:



Joe Nichols

- The Modeling the Future Challenge, our national high school math competition, held its inaugural Symposium in New York. The Challenge introduces the work of actuaries to high school students and awards \$55,000 in scholarships.
- The Math Motivators tutoring program, our volunteer-driven math tutoring program pairing high school students in underserved communities with professional actuaries and college students, received an incredible boost with nearly \$129,000 raised through your generous donations. These donations will help us continue to expand the program and give access to more students in more communities across the country.
- Actuaries throughout the United States raised over \$60,000 to help rebuild math classrooms in Florida, Texas and Puerto Rico through the Foundation's *Rebuild Math Classrooms* effort.

Each of the strides we have made in providing innovative tools and resources that improve math education and financial literacy were made possible with your support. Whatever your role; mentor, volunteer, reviewer, content expert, presenter, donor; all are essential to the Foundation's success. On behalf of the Foundation's Board of Directors and everyone who benefits from your generosity, we are profoundly grateful for all that you make possible.

I hope you enjoy this look back at 2018 and that you will continue to join The Actuarial Foundation in looking forward to future successes.

Sincerely,

Joe Nichols, ASA, EA, MSPA
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!**

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WHAT YOU MADE POSSIBLE...



The inaugural Modeling the Future Challenge Symposium was held at the Museum of the City of New York.



The Actuarial Foundation wins a 2018 Power of A Summit and Gold Award for the Math Motivators tutoring program.



Launched a Planned Giving website-actuarialfoundationplannedgiving.org/



Released several new middle school *Math Workshop* modules and the Hardest Math Problem student contest as part of the *Expect the Unexpected with Math®* series.



Raised \$128,922 in the first year of the Society of Actuaries Math Motivators Matching Gift Campaign.



Three scholarship recipients shared their stories at an Ernst & Young sponsored luncheon at the CAS Annual Meeting, raising \$4,300 for the Actuarial Diversity Scholarship and the International Association of Black Actuaries Scholarship.



Steve Lowe and CAS Members raised over \$55,000 in the Casualty Actuarial Society's 100 Donors in December.



Actuaries throughout the United States raised over \$60,000 to rebuild math classrooms in Florida, Houston and Puerto Rico.



The first participants were awarded \$55,000 in scholarships in the inaugural Modeling the Future Challenge.

FUNDING OUR MISSION

BALANCE SHEET

ASSETS

Cash and cash equivalents	\$ 497,415
Investments	5,636,752
Contributions receivable	396,451
Prepaid expense	7,995
Fixed assets	16,033
Total Assets	\$ <u>6,554,646</u>

LIABILITIES & NET ASSETS

Liabilities

Accounts payable	\$ 447,270
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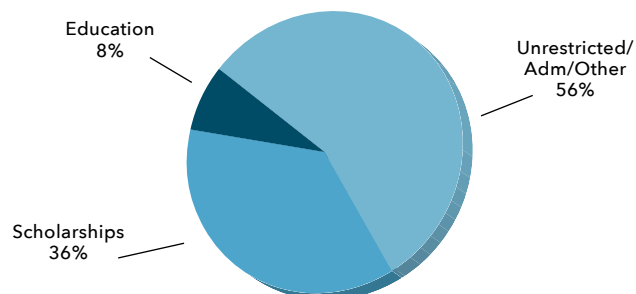
Net Assets

Without Restrictions:	
Available for Operations	2,844,053
Board Designated	722,648
Total Unrestricted	\$ <u>3,566,701</u>

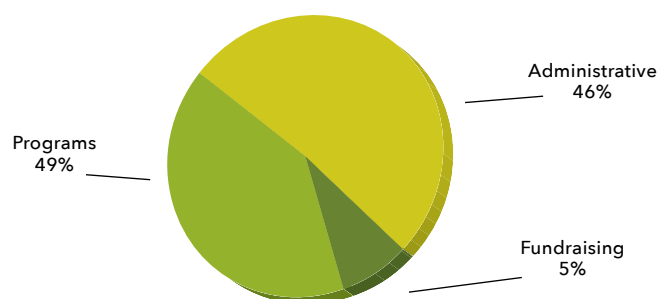
Temporarily restricted	2,540,675
Total Net Assets	\$ <u>6,107,376</u>

Total Liabilities and Net Assets	\$ <u>6,554,646</u>
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2018 Total Revenue



2018 Total Expenses



STATEMENT OF ACTIVITIES

	Unrestricted	Temporarily Restricted	Total
Revenues			
*Contributions:			
Actuarial Organizations' Support	\$ 599,360	-	\$ 599,360
Annual Gifts	476,176	867,564	1,343,740
Other	18,993	-	18,993
Net assets released from restriction	678,011	(678,011)	-
Total Revenues	1,772,540	(189,553)	\$1,962,093
Expenses			
Program related expenses:			
Awards & Prizes	25,868	-	25,868
Education	847,555	-	847,555
Scholarships	211,035	-	211,035
Total Program Related Expenses:	1,084,458	-	1,084,458
Operating expenses:			
Fundraising	172,257	-	172,257
Administrative support	849,031	-	849,031
Total Operating Expenses	1,021,288	-	\$1,021,288
Total Expenses	2,105,746	-	2,105,746
Change in net assets before investment income	(333,206)	189,553	(143,653)
Invest Income Loss (Net)	(226,668)	(24,907)	(251,575)
Change in net assets	(559,874)	164,646	(395,228)
Net assets at:			
Beginning of year	\$4,126,575	2,376,029	6,502,604
End of year	\$ <u>3,566,701</u>	\$ <u>2,540,675</u>	\$ <u>6,107,376</u>

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