



annual report

VOICES

OF OUR IMPACT

2022-2023

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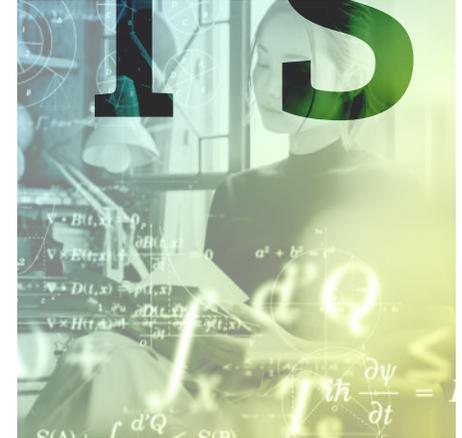
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## Hello, friends of the Foundation.

In this Annual Report, we are excited to share the incredible projects, initiatives, and programs that the Actuarial Foundation has brought to students around the nation this year.

We reached new milestones with Modeling the Future Challenge and our Math Motivators tutoring program. Our new STEM Stars Actuarial Scholars Program and Money Mentors financial literacy initiative built upon their early successes, bringing mentorship to students who need it most. This year, we supported 78 students with scholarships as they pursue bright futures in the actuarial profession.

As you'll see in the following pages, the Foundation has continued to offer high quality, free, education resources, textbooks, and guides to teachers and families throughout the country.

We are deeply grateful for our volunteers, individual and corporate supporters, staff, and Board of Trustees who make our important work possible. We couldn't accomplish our mission without you.



Sincerely,  
Jeff Johnson, FSA, MAAA  
2022-2023 Chair  
Board of Trustees



A Program of The Actuarial Foundation

**The Hardest Math Problem  
Student Contest**



A Program of The Actuarial Foundation

**Modeling the Future  
Challenge**

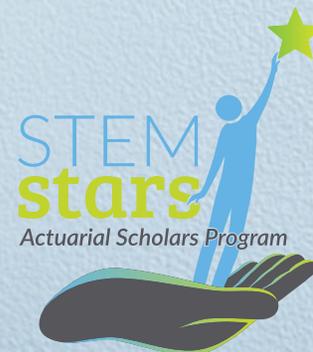


A Program of The Actuarial Foundation

**Math  
Motivators**



A Program of The Actuarial Foundation



Our commitment to our mission – enhancing math education and financial literacy through the talents and resources of actuaries – is stronger than ever. Since the pandemic began, we have doubled down on our math tutoring, financial literacy, competition and scholarship programs. We are tackling today’s top issues with innovative strategies and proven solutions.

# PROGRAMS



Expect the Unexpected with Math • The Hardest Math Problem Student Contest  
Modeling the Future Challenge • Math Motivators • Money Mentors • STEM Stars Actuarial Scholars Program



COMPUTER LAB ACTIVITIES

Functions, Slope, and Y-Intercept

Grades  
8

# Expect the Unexpected with Math

Designed for grades 6–8, the dynamic lessons and activities in the Expect the Unexpected with Math series use fun and engaging storylines to show students the relevance of math. These activities motivate students to achieve math success in and out of the classroom through exploring real-life math-based scenarios.



Escaping the Museum with Math

UNIQUE USERS

7,614



Math Practice with Ecosystems



# The Hardest Math Problem Student Contest

This annual competition presented by The Actuarial Foundation, our educational partner, Scholastic, and the New York Life Foundation challenges students in grades 6–8 to solve multistep, grade-specific math problems with real-world situations and engaging characters. This approach helps students learn applied math skills and actuarial concepts in a wide range of scenarios. Advanced fifth graders are also eligible to participate.

## WINNERS

### GRADE 6

**Grand-Prize Winner:**

Lillian M., Grade 5,  
Pierre Van Cortlandt  
Middle School,  
Croton-on-Hudson, NY

**Runner-Up:**

Callen P., Grade 6,  
Cashmere Middle  
School, Cashmere, WA

### GRADE 7

**Grand-Prize Winner:**

Christina P., Grade 7,  
Garvey Intermediate,  
Rosemead, CA

**Runner-Up:**

Xavier C., Grade 7,  
Para Los Niños Charter  
Middle School, Los  
Angeles, CA

### GRADE 8

**Grand-Prize Winner:**

Lucia K., Grade 8,  
North Bethesda  
Middle School,  
Bethesda, MD

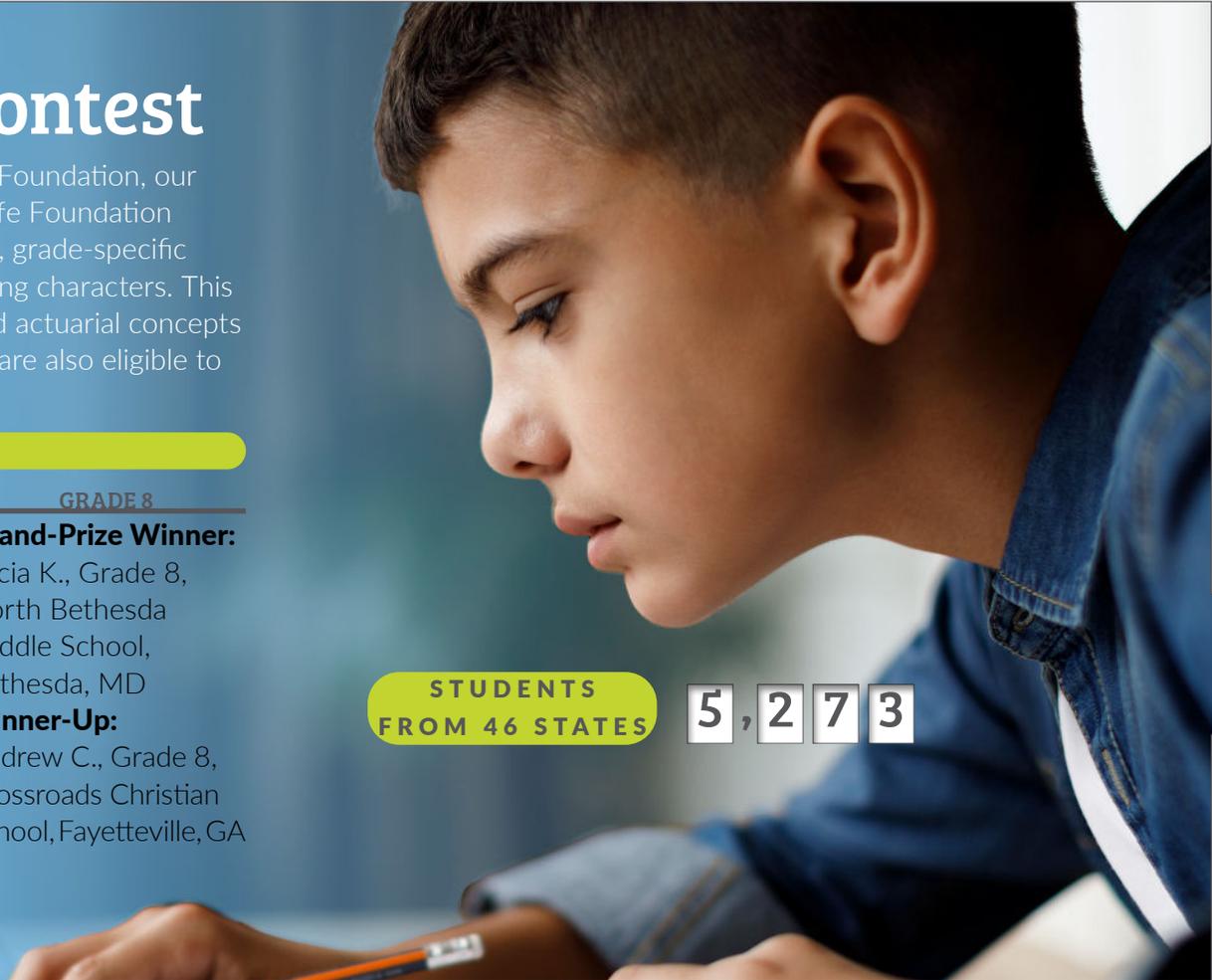
**Runner-Up:**

Andrew C., Grade 8,  
Crossroads Christian  
School, Fayetteville, GA

STUDENTS  
FROM 46 STATES

5, 273

VOICES



Listen to how one family's experience with math was changed by The Hardest Math Problem Contest



Boris, parent of winning student

produced in partnership with



NEW YORK LIFE  
FOUNDATION



A Program of The Actuarial Foundation  
The Hardest Math Problem  
Student Contest



# Modeling the Future Challenge



A Program of The Actuarial Foundation

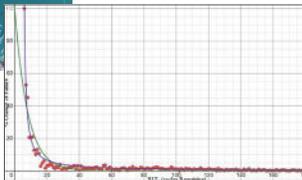
## Modeling the Future Challenge

The Modeling the Future Challenge (MTFC) is a competition for high school students combining math modeling, data analysis, and risk management into one exciting competition! To compete, students conduct their own research project modeling real-world data to analyze risks and make recommendations to companies, industry groups, governments or organizations.

### Sample Projects



Demographic and Geographic Characteristics on Melanoma Incidences



**VOICES**  
**“THE STUDENTS WERE BRIGHT, AMBITIOUS, AND FULL OF ENERGY! IT WAS FUN GUIDING THEM THROUGH MATH-BASED PROJECTS.”**

**Zane Meraz, Volunteer Mentor and former Actuarial Diversity Scholarship Recipient**

Thanks to our generous donors and corporate sponsors, this competition is accessible to all students with free registration, free live and prerecorded webinars, a free online library, free data, and access to actuary mentors who help teams hone their projects in the Challenge.

This year, **over 1,000 students from 24 states** participated in the Challenge with more than 25% from underserved schools. **51% of student survey respondents stated they are considering the actuarial profession** due in part to their participation in the MTFC!

**STUDENTS FROM 24 STATES** 1,000+



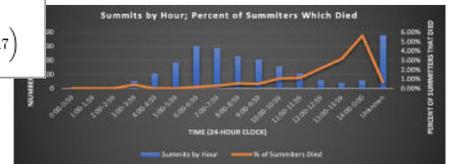
Stage	Localized	Regional	Distant	Unstaged
Percentage of cases	77.9%	9.3%	4.7%	8.2%
Treatment Costs	\$3,211	\$10,881	\$21,717	Negligible

Table 9: Stage percent breakdown and corresponding costs

$$\text{Cost} = \left(\frac{77.87}{100} \cdot C_{\text{pop}} \cdot 3211\right) + \left(\frac{9.28}{100} \cdot C_{\text{pop}} \cdot 10881\right) + \left(\frac{4.69}{100} \cdot C_{\text{pop}} \cdot 21717\right)$$

**Dying at the Top: Death on Mount Everest**

**The Barrier Between: Risk Analysis of Sea/Tide Level Rise in Boston**



# Modeling the Future Challenge

## UNIVERSITY PARTNERS

This year six university partners across the country opened their campuses to local students to learn how to apply what they learn in high school mathematics classes to their college and career opportunities with actuarial science. At these single-day workshops, more than 400 students had the opportunity to learn how actuaries approach data science, mathematical modeling, and risk analysis.

**NEW!**

In the Spring, Regional MTFC Competitions were held for the first time at California State University-Fullerton and Bentley University, which allowed local student teams to present their projects in person to actuary judges.



**NEW AWARD!**

IOWA GOVERNOR'S STEM ADVISORY COUNCIL SEAL OF APPROVAL  
This Seal of Approval indicates that our program advances as one of the most progressive state STEM initiatives in the country.



## MTFC is made possible by the generous support of our sponsors

**Pioneer Sponsor**



**Pacesetter Sponsors**



**Builder Sponsors**



**Rick & Beth Jones**

**Founding Sponsor**

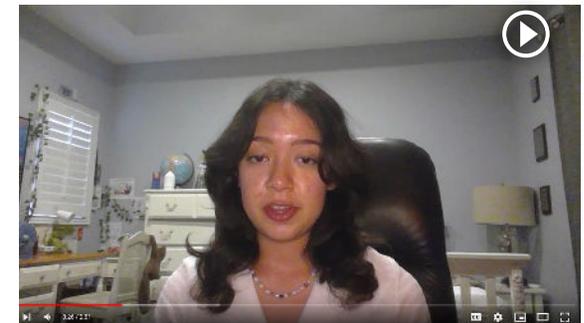
**Roy & Georgia Goldman**

**Helen Galt Education Award Supporter**



**"I'VE LEARNED SO MUCH TO USE THE REST OF MY LIFE IN MODELING AND IN STEM IN GENERAL."**

MTFC First Place Winner Julia Hudson



# Modeling the Future Challenge Symposium

## WINNERS

Topic categories for this year's Challenge ranged from drought severity and data breaches in the healthcare sector to space debris and reducing recidivism in Iowa state prisons. Each finalist brought their very best to the table. The winners of the 2022-2023 Challenge were:

### FIRST PLACE

#### Space Junk

*Julia Hudson from New Trier High School in Winnetka, IL*

### SECOND PLACE

#### Reducing Recidivism in Iowa State Prisons

*Amar Kanakamedala, Jeffrey Liu, Evan Wu, Henry Yu and Lou Zhou from Memphis University School in Memphis, TN*

### THIRD PLACE

#### Dryland Salinity in Australia

*Abhinav Gorrepati, Shreyans Jain, Sarthak Jain, Vinay Singamsetty and Ryan Tabatabai from Silver Creek High School in San Jose, CA*

### FOURTH PLACE

#### Data Breaches in Healthcare

*Tyler Li, Alex Lin, Kevin Shen and Alexander Wang from Stevenson High School in Lincolnshire, IL*



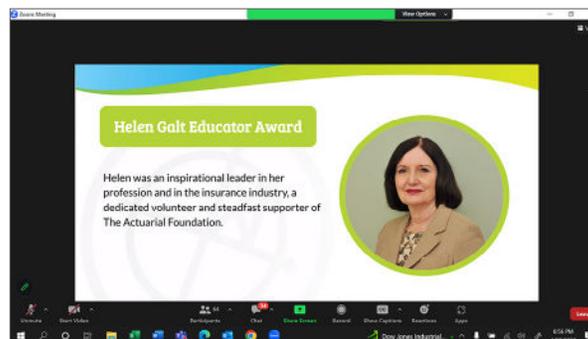
## KEYNOTE

Maverick Actuary Dominic Lee, a globally recognized thought leader, presented the keynote address during the Virtual Symposium's Opening Ceremony. The "Live With The Maverick" host reviewed the students' projects before the event so he could incorporate their work into his presentation. This personal touch helped students interested in pursuing actuarial or other STEM-based careers see how the work they did on their MTFC projects has prepared them as they enter college and pursue careers.



## HELEN GALT EDUCATOR AWARD

The MTFC Educator Award was renamed in 2022 to honor longtime Foundation supporter Helen Galt. Helen was an inspirational leader in the actuarial profession and insurance industry, and a dedicated volunteer and steadfast supporter of The Actuarial Foundation. She was an early supporter of the MTFC, and her efforts helped expand the program to become an elite national competition.



## HELEN GALT AWARD SUPPORTER



# Math Motivators

NEW RECORD!

STUDENTS FROM 21 STATES

1,538

A Program of The Actuarial Foundation  
**Math Motivators**

Thanks to the generosity of our amazing donors and volunteers, we provided free math and financial literacy tutoring to a record number of students in 2022–2023 through our Math Motivators Tutoring Program.



*Math Motivators volunteer tutor Abigail Fortino, an actuary at Conrad Siegel, works with middle school students, using a combination of games and one-on-two instruction to help struggling students to advance in mathematics.*

## National Virtual Tutoring Center (VTC)

In 2022–2023, we provided tutoring through partnerships in 31 cities and supported students through the VTC from another 23 cities. Virtual tutoring has allowed us to expand our reach to students who don't live close to our volunteers, are not enrolled at our select partner schools or centers, or are not available until later in the day.

**“WE ARE VERY EXCITED, NOT ONLY ABOUT MAJESTY’S SUCCESS HERE, BUT THAT SHE UNDERSTANDS THAT SHE HAS THE POWER TO CHANGE HER CIRCUMSTANCES WITH INTENTIONAL WORK. I CANNOT THANK YOU ENOUGH FOR BEING A PART OF MAJESTY’S VILLAGE AND FOR SUPPORTING HER. YOU HAVE HELPED HER CONFIDENCE, AND WE HAVE NO DOUBT THAT SHE WILL CONTINUE TO STRIVE AND BE SUCCESSFUL. THANK YOU SO MUCH, JERRY MICCOLIS!”**



*Shernett Edwards-Moore’s daughters Majesty-Alexis (left) and Princess-Larrine (right) both benefited from Math Motivators’ VTC program in different ways. Click the image to hear their story.*



# Math Motivators

EXPANDED!



We have provided math tutoring in Des Moines for four years. Beginning with one high school and 20 students, the program has grown to include all five Des Moines public high schools and one middle school, **servicing a total of 187 students**. Twelve additional students received tutoring through our Virtual Tutoring Center, bringing the **total number served to just under 200**.

Volunteers from eleven local companies and two universities joined together to support these students. The Math Motivators program in Des Moines is a prime example of how professionals and university students in actuarial science and other STEM fields have come together to positively impact students' lives by helping them increase their confidence and success in mathematics and problem-solving, and broaden their career interests and options.

# Money Mentors

54 students received financial literacy tutoring using our newly developed Money Mentors curriculum. Using this curriculum and our tutoring approach, we empowered young people to make conscious choices about their resources, time, and energy. Two formats were available: a multi-week course or a weekend workshop. In addition to our programs in Indiana and northern California, Money Mentors served students through the Virtual Tutoring Center.

*Students at Simon Youth Academy in Shelbyville, IN enjoyed our Money Mentors program so much the school ran it twice in 2022-2023!*



What our tutors say about Money Mentors

**"I ENJOYED UNDERSTANDING THE MINDSET OF MY STUDENT AS HE THOUGHT ABOUT THE FUTURE, AND THEN HELPING FILL IN THE BIGGEST GAPS THAT MAY NOT HAVE BEEN IN HIS THINKING TO DATE."**

**"I FOUND IT REWARDING SEEING THEM WORK THROUGH AND TALK THROUGH DISCRETIONARY SPENDING AND REALIZING HOW SOME OF THAT WOULD NEED TO BE CUT OUT OF THEIR BUDGET. IT IS HARD FOR PEOPLE TO SEE AND ADMIT THAT, SO I WAS HAPPY TO SEE THEM SAY THAT SOME OF THEIR SPENDING IS UNNECESSARY."**

NEW!



# STEM Stars Actuarial Scholars Program

Through the STEM Stars Actuarial Scholars Program we identify qualified high school students interested in becoming actuaries and walk with them on their journey from high school to college to an actuarial career. In addition to financial assistance, students benefit from

mentorship, networking opportunities, and direct connections with actuaries and the companies that hire them. 40 first- and second-year college students are currently pursuing their goals of becoming actuaries through this program.



### 2022 STEM Stars

We are already seeing tremendous progress and achievements not usually seen by first-year students. We are impressed with their successes and inspired by their enthusiasm.

### RESULTS

- One Star has passed two exams (P & FM), and another has passed one exam (FM). Six others have attempted an exam. Our Stars are pairing up to study and help one another prepare. to retake the exam.
- Ten Stars obtained summer internships in actuarial positions. One additional Star will complete an internship in Finance/Economics.
- Several of our Stars have won other scholarships to help support their future education.

**40 students**  
**56 mentors**



**“WINNING THIS SCHOLARSHIP HAS OPENED THE DOOR TO SO MANY OPPORTUNITIES AND HAS STRENGTHENED MY DRIVE TO ENTER INTO THE ACTUARIAL PROFESSION.”**

**Mikayla Allen,**  
2022–2023 STEM Star



*The first STEM Stars cohort attends an in-person summer orientation along with representatives from Travelers and State Farm.*

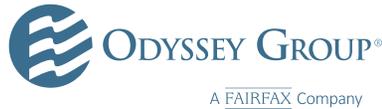
# 2023 STEM Stars Corporate Advisory Council.

Thank you to the following companies who share our commitment to increasing diversity in the actuarial profession.

Founding Partner



ARCH GROUP FOUNDATION



Recipients of Foundation scholarships are selected by representatives of the actuarial profession who one day may be their peers. In addition to offsetting the cost of education, these scholarships serve as a prestigious recognition by a highly rated profession.

# SCHOLARSHIPS

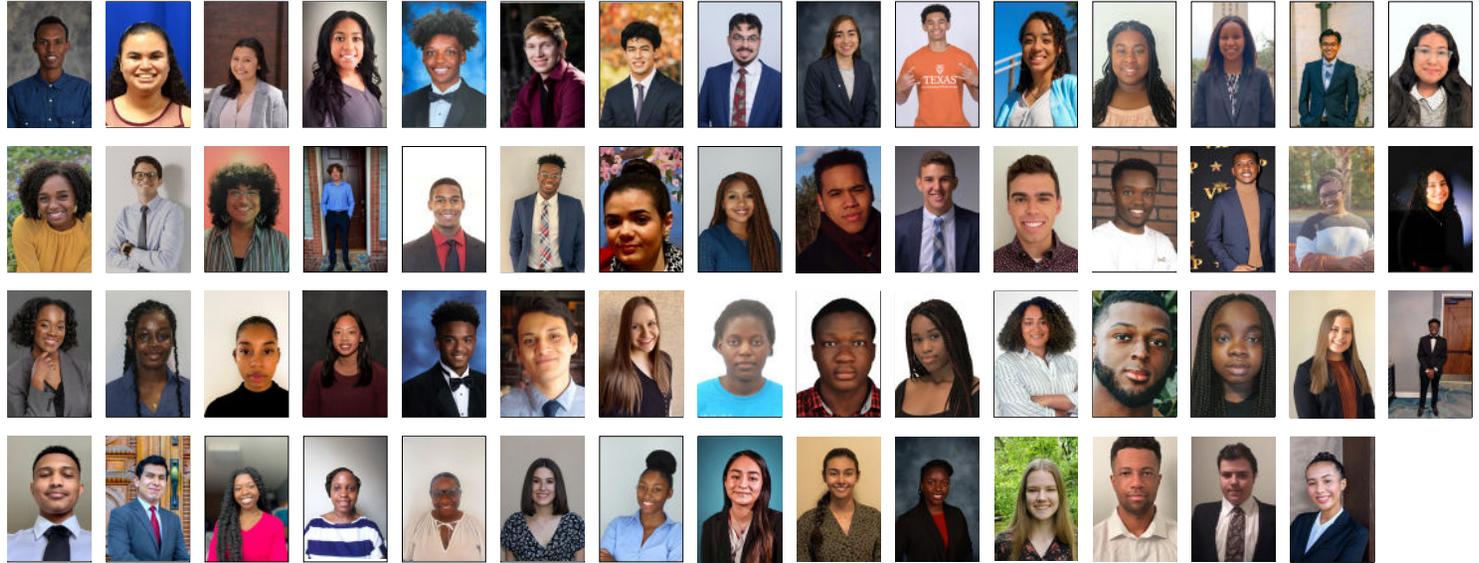


**Actuarial Diversity Scholarship • Actuary – A Career Change: Elizabeth M. Mauro Reimbursement Program • Actuary of Tomorrow – Stuart A. Robertson Scholarship • Caribbean Actuarial Scholarship • Curtis E. Huntington Memorial Scholarship**

# 78 students were awarded scholarships this year...

## Actuarial Diversity Scholarship\*

\*To enhance our impact on diversity in the actuarial profession, beginning in 2024, the Actuarial Diversity Scholarship will transition into the STEM Stars Actuarial Scholars Program.



## Actuary of Tomorrow – Stuart A. Robertson Scholarship



## Actuary – A Career Change: Elizabeth M. Mauro Reimbursement Program



## Curtis E. Huntington Memorial Scholarship



## Caribbean Actuarial Scholarship



Financial support and volunteer time help The Actuarial Foundation continue to offer our free math education and financial literacy programs, resources, and scholarships to meet the changing needs of thousands teachers, students, and parents.

# FUNDRAISING

THANK  
you!

Back to School Campaign • Formula 2023 Virtual Gala: Multiplying the Power of Math & Diversity

# Back to School Campaign Launch

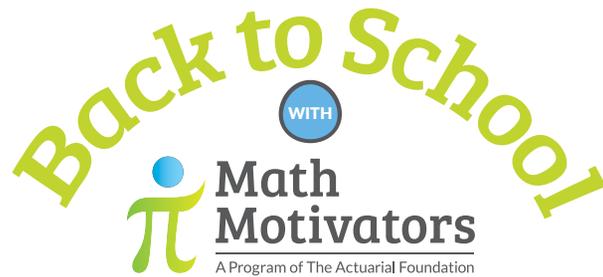
NEW!

Higher levels of math proficiency mean a higher quality of life, personally and professionally. With this in mind, we launched our inaugural Back to School with Math Motivators Campaign in August 2022. Thanks to our generous supporters, we raised more than \$30,000 to ensure students have the tools they need for success. Special thanks to Emeritus Trustee David Hartman who matched gifts for this important campaign.



**“WHAT A JOY IT IS TO SEE A KID WHO HAS BEEN HAVING TROUBLE WITH MATH THEN GRASP MATH CONCEPTS THAT COME SO EASILY FOR ACTUARIES AS A RESULT OF ACTUARIAL TUTORING — AT NO COST TO THE KID. MANY THANKS TO ALL WHO CONTRIBUTED TO THE SUCCESSFUL BACK TO SCHOOL CAMPAIGN IN SUPPORT OF THE MATH MOTIVATORS PROGRAM OF TAF!”**

David Hartman, Emeritus Trustee



*Back to School with Math Motivators campaign materials included social media posts, direct mail solicitations with tutoring success stories and a social media toolkit with links and instructions for creating dynamic content about the program.*



RAISED \$ 30,000 +

**Meet Princess & Majesty**  
A Math Motivators Success Story

Dear Friend,

As you know, at The Actuarial Foundation, we are committed to helping young people reach their potential in math. Higher levels of math proficiency mean a higher quality of life, personally and professionally. Through our Math Motivators Tutoring Program, we work to ensure EVERY young person has the tools they need to succeed. **As we prepare for the new academic year, we invite you to invest in the futures of the students we serve.** Let's make sure they go back to school ready for success!

Two of the over 1,500 students you'll be championing, Princess and Majesty Edwards, are exceptionally gifted sisters. In 2022, both sisters were placed in accelerated courses; however, soon after that, both began experiencing struggles in math. Princess was in danger of failing, and Majesty was going unchallenged. According to their mother, Shernett:

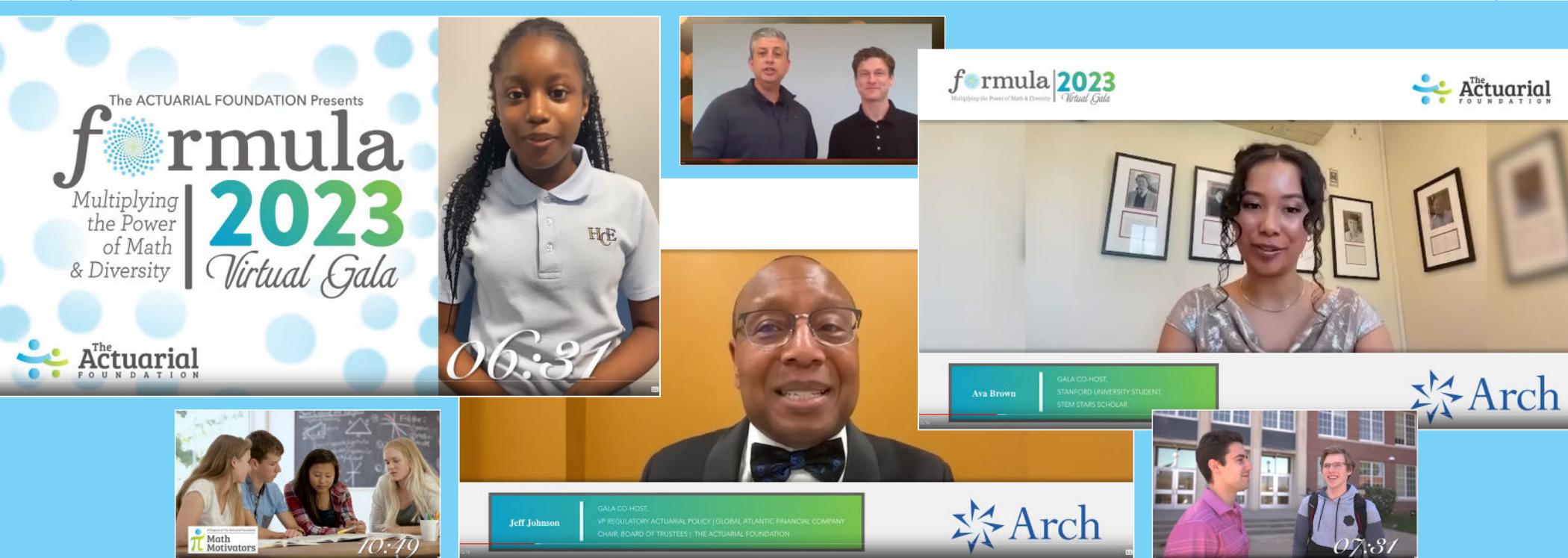
*Princess always used to struggle with math. She was highly motivated, but her math brain hadn't turned on. We watched her work for hours, trying because she couldn't do it by herself.*

# formula | 2023

Multiplying the Power of Math & Diversity | Virtual Gala

Our second annual virtual gala was a huge success, raising nearly \$200,000 to support our math and financial literacy tutoring, competition and scholarship programs, ensuring that young people nationwide have the math skills and confidence to succeed in life and careers. A huge shout-out to those who joined us on May 11, 2023, and to the sponsors who helped make this event a success!

RAISED \$ 200,000



**“AS SOMEONE NEW TO ACTUARIAL FOUNDATION, I LOVED HEARING ABOUT THE HISTORY, LISTENING TO FIRSTHAND ACCOUNTS FROM THE STUDENTS AND HOW THE FOUNDATION HELPS OTHERS.”**

Gala attendee, via the Foundation’s fall 2023 membership survey

Every day, in many ways, math impacts the world. That is why The Actuarial Foundation partners with actuaries and others to equip students with the tools they need to make informed decisions and become the math-skilled leaders of tomorrow.

# ABOUT US

Our Office • [ActuarialFoundation.org](http://ActuarialFoundation.org) • Balance Sheet • Statement of Activities  
Board of Trustees • Emeritus Trustees • Individual Donors and Family Foundations • Foundation and Corporate Supporters

## ABOUT US

# Our Office

We have moved to a new office in Schaumburg, IL. The new location is perfect for our primarily remote staff, equipped with an executive office, conference room, and five additional workspaces.

NEW!



The Actuarial Foundation  
1515 East Woodfield Road, Suite 625  
Schaumburg, IL 60173

# On the Web

In early 2023, we unveiled a redesigned website developed with our various stakeholders in mind. The site's navigation menu now makes it very clear where students, teachers, parents, actuaries, and donors can each find the information that's most relevant to them, contributing to an improved and streamlined experience.

Redesigning the website also provided the opportunity to tell our story and show the impact of our programs in a new way. The website is full of photos, videos, and data demonstrating how we are making a difference through math education and financial literacy.

NEW!



Visit us at [actuarialfoundation.org](https://actuarialfoundation.org)



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We appreciate our individual donors and the family foundations who share our commitment to strengthening math skills for future success.

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Carter Chapman Shreve Family Foundation

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## **PATHFINDER - \$25,000+**

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## Statements of Financial Position, Years Ended May 31, 2023 and May 31, 2022

<b>Assets</b>	<b>2023</b>	<b>2022</b>
Cash and Cash Equivalents	\$ 475,675	\$ 773,728
Investments	\$ 5,812,043	\$ 7,091,491
Contributions Receivable, Net	\$ 914,706	\$ 1,189,266
Prepaid Expense	\$ 86,858	\$ 72,662
Property and Equipment, Net of Accumulated Depreciation	\$ 34,294	---
Right-of-Use Finance Lease Asset	\$ 31,819	---
Right-of-Use Operating Lease Asset	\$ 24,111	---
Total Assets	<u>\$ 7,379,506</u>	<u>\$ 9,127,147</u>
<b>Liabilities and Net Assets</b>		
<b>Liabilities</b>		
Accounts Payable and Accrued Liabilities	\$ 951,099	\$ 727,009
Lease Liability - Finance	\$ 31,845	---
Lease Liability - Operating	\$ 26,206	---
Total Liabilities	<u>\$ 1,009,150</u>	<u>\$ 727,009</u>
<b>Net Assets</b>		
Without Donor Restrictions:		
Available for Operation	\$ 2,840,367	\$ 4,757,172
Board Designated	\$ 500,522	\$ 668,706
Total Net Assets Without Donor Restrictions	<u>\$ 3,340,889</u>	<u>\$ 5,425,878</u>
With Donor Restrictions	\$ 3,029,467	\$ 2,974,260
Total Net Assets	<u>\$ 6,370,356</u>	<u>\$ 8,400,138</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u><u>\$ 7,379,506</u></u>	<u><u>\$ 9,127,147</u></u>

## Statements of Activities, Years Ended May 31, 2023 and May 31, 2022

	2023			2022		
	Without Donor Restrictions	With Donor Restrictions	Total	Without Donor Restrictions	With Donor Restrictions	Total
<b>REVENUES</b>						
Contributions:						
Actuarial Organizations Support	\$ 557,866	--	557,866	226,543	--	226,543
Annual Gifts	1,078,525	1,617,151	2,695,676	1,848,891	1,195,690	3,044,581
Support In-kind	218,750	--	218,750	375,000	--	375,000
Net Assets Released From Restrictions	1,557,981	(1,557,981)	--	1,910,128	(1,910,128)	--
<b>Total Revenues</b>	<b>3,413,122</b>	<b>59,170</b>	<b>3,472,292</b>	<b>4,360,562</b>	<b>(714,438)</b>	<b>3,646,124</b>
<b>EXPENSES</b>						
Program Services:						
Awards and Prizes	\$ 17,489	--	17,489	10,550	--	10,550
Education	2,649,053	--	2,649,053	2,302,879	--	2,302,879
Scholarships	659,387	--	659,387	356,513	--	356,513
Total Program Services	3,325,929	--	3,325,929	2,669,942	--	2,669,942
Supporting Services:						
Management and General	1,222,370	--	1,222,370	1,315,206	--	1,315,206
Fundraising	906,275	--	906,275	614,937	--	614,937
Total Supporting Services	2,128,645	--	2,128,645	1,930,143	--	1,930,143
<b>Total Expenses</b>	<b>5,454,574</b>	<b>--</b>	<b>5,454,574</b>	<b>4,600,085</b>	<b>--</b>	<b>4,600,085</b>
<b>CHANGE IN NET ASSETS BEFORE INVESTMENT LOSS, NET</b>	<b>\$ (2,041,452)</b>	<b>59,170</b>	<b>(1,982,282)</b>	<b>(239,523)</b>	<b>(714,438)</b>	<b>(953,961)</b>
<b>INVESTMENT LOSS, NET</b>	<b>(43,537)</b>	<b>(3,963)</b>	<b>(47,500)</b>	<b>(441,210)</b>	<b>(59,087)</b>	<b>(500,297)</b>
<b>CHANGE IN NET ASSETS</b>	<b>(2,084,989)</b>	<b>55,207</b>	<b>(2,029,782)</b>	<b>(680,733)</b>	<b>(773,525)</b>	<b>(1,454,258)</b>
Net Assets, Beginning of Year, As Originally Reported	5,425,878	2,974,260	8,400,138	6,406,745	3,447,651	9,854,396
Prior Period Adjustment	--	--	--	(300,134)	300,134	--
Net Assets, Beginning of Year, As Restated	5,425,878	2,974,260	8,400,138	6,106,611	3,747,785	9,854,396
Change in Net Assets,	(2,084,989)	55,207	(2,029,782)	(680,733)	(773,525)	(1,454,258)
<b>NET ASSETS, END OF YEAR</b>	<b>\$ 3,340,889</b>	<b>3,029,467</b>	<b>6,370,356</b>	<b>5,425,878</b>	<b>2,974,260</b>	<b>8,400,138</b>