



MDRT
FOUNDATION
Financial Professionals
Changing Lives Worldwide™

Rising to the Moment

2020 Annual Report



“Without
resiliency,
nothing
worthwhile
is possible.”

Brian P. Walsh, CLU, ChFC
2021 President



A handwritten signature in dark ink, appearing to read 'B. Walsh', set against a light blue background.

Brian P. Walsh, CLU, ChFC
2021 MDRT Foundation President

WHAT AN IMPACT COVID-19 MADE AROUND THE WORLD.

It challenged each of us to channel our own resiliency and continue to make great impact on the quality of people's lives. As an organization, the MDRT Foundation proved its resiliency.

We accepted the changing world and did not allow it to stand in the way of great achievement. We allowed our voice to be heard around the world as we advocated to help a record number of charities. And we came together as an MDRT community to check in on one another.

We completed a three year strategic plan and have begun implementation. Please be on the lookout for exiting changes as we move forward.

On behalf of the MDRT, our dedicated MDRT Foundation staff and member volunteers I am pleased to present the 2020 Annual Report of global goodness contributed by our members. There are countless examples of the achievements and contributions our members have made to make our world a better, safer, and more loving place.

For those members that are actively contributing we thank you for your involvement, thank you for your monetary contributions and thank you for helping us make our world better than we found it.

Strategic Planning

This year the Foundation engaged with hundreds of MDRT members, donors, and volunteer leaders in the creation of a new strategic plan. Led by the board of trustees, this plan will guide the work of the Foundation for the next three years.

The plan's framework has four key pillars:

Enhancing engagement with the global membership.

Increasing revenue.

Improving how we tell our story.

Modernizing operations.



The Foundation updated its **mission** and **vision** statements:



Core **values** were developed to guide the Foundation's work:

Mission

The Million Dollar Round Table Foundation gives to charitable organizations worldwide, demonstrating the generosity, service and impact of MDRT members.

Vision

To empower MDRT members to make a difference in their communities around the world.

Values

To engage all Members through global reach, local impact, MDRT Foundation must:

Lead with love, hope and the joy of giving

Embrace and uphold inclusivity


Foster connection, empowerment and service

Steward all gifts with care, diligence and wisdom

Well Constructed Ghana

Grant Recipient





“Despite our first-ever dip in annual fundraising, we were able to complete our goal of 50 wells in the year, our highest number ever, all while taking on the new project of installing hand-washing stations at each well.”

Executive Director Nathan Rogers

Well Constructed Ghana

Grant Recipient





It would be difficult to overstate how much Well Constructed – an organization founded in 2015 to provide clean drinking water to people in Ghana – was impacted by the pandemic.



Grant Received



2020
quality
of life
grant

Not only was fundraising drastically impacted by the inability to have the traditional, in-person “Giving Week,” but extensive work was needed to ensure that the charity’s water wells did not become hubs to spread the coronavirus.

That meant raising funds for handwashing stations, infographic signs and more, while also requiring flexibility due to delays in the supply chain of hand pumps for the wells. This is just part of what made the \$50,000 grant from the MDRT Foundation so impactful to Well Constructed, which was able to build wells in 15 communities and provide clean water to 6,552 people. The grant was sponsored by Howard A. Udoff, RHU, CLTC, a 17-year MDRT member from Bloomfield, New Jersey, who is so thankful to get to see pictures of smiling people in Ghana who have received clean water from these wells. For Udoff, it is a matter of resolving a situation that many take for granted. “Can you imagine carrying gallons of water on your head for miles at a time every day?” he said. “It shouldn’t be a burden to get clean water.”

MDRT Member Sponsor



Howard A.
Udoff,
RHU, CLTC



Grant Amount



USD 50,000

Rainbow Centre Singapore

Grant Recipient



“Even in hard times,
our Foundation
never fails to rise
up to the occasion.
It’s the giving nature
of our membership
that shines through
for me.”

Title and Name needed

Rainbow Centre Singapore

Grant Recipient





About 15 years ago Venkatesh Kalyanam, BA, CFP, learned about Rainbow Centre from a friend who was helping to provide a wheelchair for a student whose parents couldn't afford one.



Grant Received



2020
quality
of life
grant

MDRT Member Sponsor



Venkatesh Kalyanam, RHU, CLTC



Grant Amount



USD 5,000

Since then, the 27-year MDRT member from Singapore, has participated in numerous fundraising activities for the school, which works with kids with special needs.

Kalyanam particularly recalls attending a performance at the school, and the joy on stage and off throughout the night. “The kids were stars that night,” he said. “Seeing them perform and hearing the claps was phenomenal.” The \$5,000 grant from the MDRT Foundation helped fund out-of-school care for students (ages 7 to 18) with moderate-to-severe autism

spectrum disorder and multiple intellectual and learning disabilities. Like so many organizations, Rainbow Centre was hit by the uncertainties of the pandemic, but the charity used these challenges as an opportunity to adapt its services and discover new ways of serving clients to support their aspirations. That, of course, echoes the MDRT Foundation’s work, and the work of the members who support it, as well. “Even in hard times, our Foundation never fails to rise up to the occasion,” Kalyanam added. “It’s the giving nature of our membership that shines through for me.”

Family Crisis Centers Iowa, USA

Grant Recipient



“The added pressure and stress of the pandemic only proved just how resilient our staff can be. Despite the challenges and hurdles our clients often faced—court delays, job loss, housing challenges, inability to meet, and other limitations — our staff did not get discouraged, but only worked harder to ensure each person received the support and resources they deserved.”

FCC Marketing Director Tara Raman

Family Crisis Centers Iowa, USA

Grant Recipient





Sometimes, a lot of times, all it takes to get involved in a cause is being interested in and passionate about the issue.

Gretchen Zomermaand, a four-year MDRT member from Sioux Center, Iowa, read a lot about domestic violence and human trafficking and wanted to know how she could help.

It led her to help fundraise and organize groups from her church to assist with projects at Family Crisis Centers (FCC), which provides support for survivors and victims of violent crimes. Zomermaand also sponsored a \$5,000 MDRT Foundation grant to support FCC's rapid rehousing program, which provides sustainable residence for families facing homelessness because of emotional, physical, sexual, and/or financial abuse. That helped numerous FCC clients, including one whose job loss during the pandemic prevented her from being able

to relocate to care for a family member who had been attacked. The MDRT Foundation grant helped cover her moving expenses and provided hope for many who needed it. That's not the only story here about pushing forward toward positive results: Zomermaand's youngest daughter is now mentoring someone who has been abused, and her oldest daughter worked in a group home for teens who have been abused. "That has been meaningful to see my passion carry on to the next generation," she said.



Grant Received



2020
quality
of
lifegrant

Grant Amount



USD 5,000

MDRT Member Sponsor



Gretchen
Zomermaand



Your MDRT Foundation



2020 by the Numbers

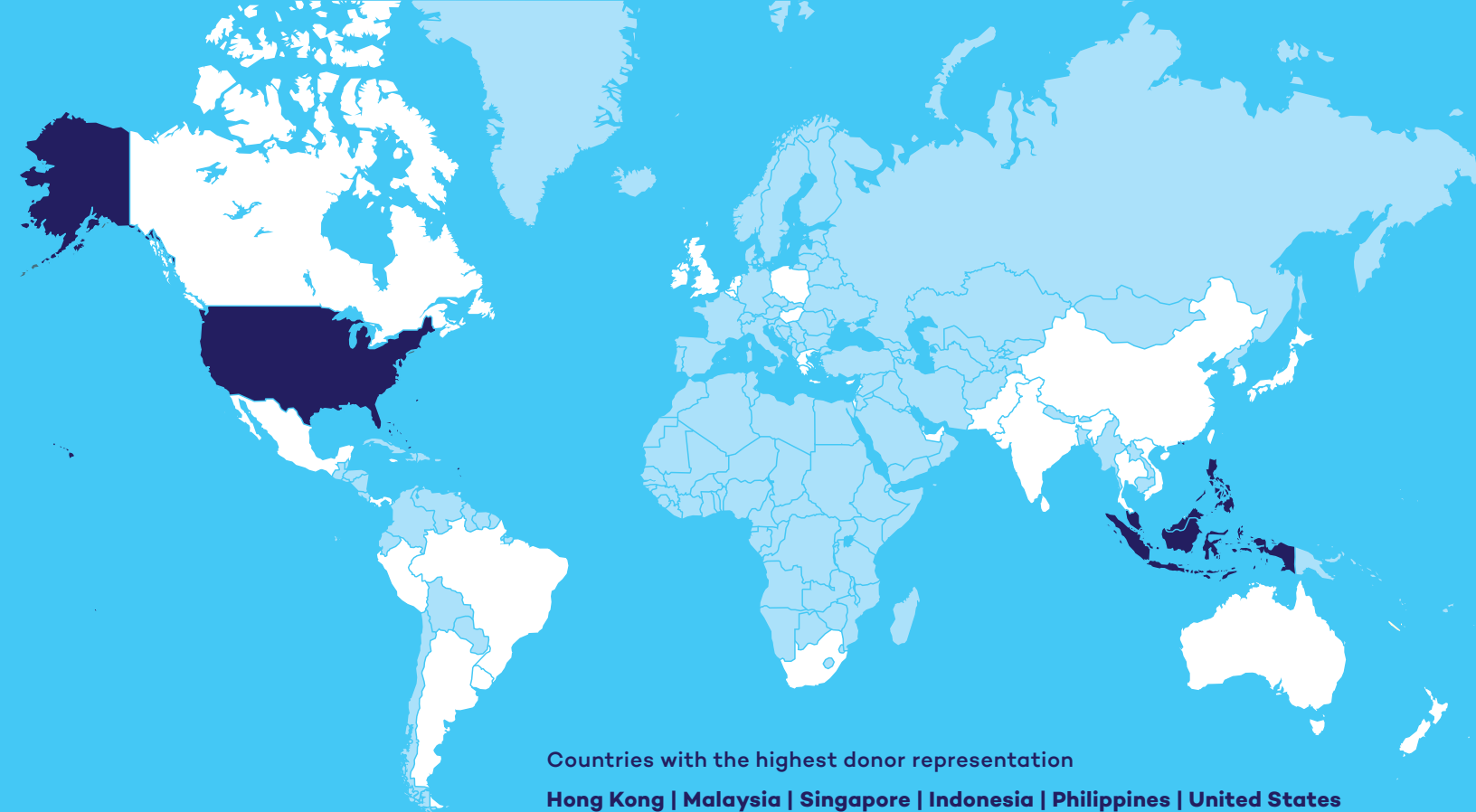
282

Grants Awarded



1,651,079

Total USD Awarded to Charitable Programs



Countries with the highest donor representation

Hong Kong | Malaysia | Singapore | Indonesia | Philippines | United States

Donors



1,886

Donors

1.28M

(USD) raised from individuals
and corporate supporters

38

countries



37

Countries impacted by MDRT Foundation grant funding

Australia
Bahamas
Cambodia
Canada
China
Costa Rica
England

Ethiopia
Ghana
Greece
Guatemala
Haiti
Honduras
Hong Kong

Hungary
India
Ireland
Israel
Jamaica
Japan
Kenya

Lebanon
Malaysia
Mexico
Nepal
Nicaragua
Panama
Philippines

Singapore
South Africa
South Korea
Taiwan
Thailand
Trinidad & Tobago

Uganda
United Kingdom
United States

Impacting Charities Worldwide

In 2020, the MDRT Foundation awarded 282 grants totaling USD 1,651,079, across multiple funding areas:

Quality of Life grants **USD 265,000**

Honors a member's volunteerism with a charity. By application process and endorsed by the MDRT member.



Charity impact at MDRT events **USD 285,616**

MDRT Annual Meeting and Global Conference, Top of the Table Annual Meeting, MDRT EDGE, MDRT Days, service projects



Life Insurance beneficiaries **USD 92,563**

Grants awarded to additional charitable beneficiaries named in policies owned by and benefiting the MDRT Foundation.



Worldwide grant program **USD 754,900**

Awarded to a diverse range of charitable programs. By application process and endorsed by an MDRT member.

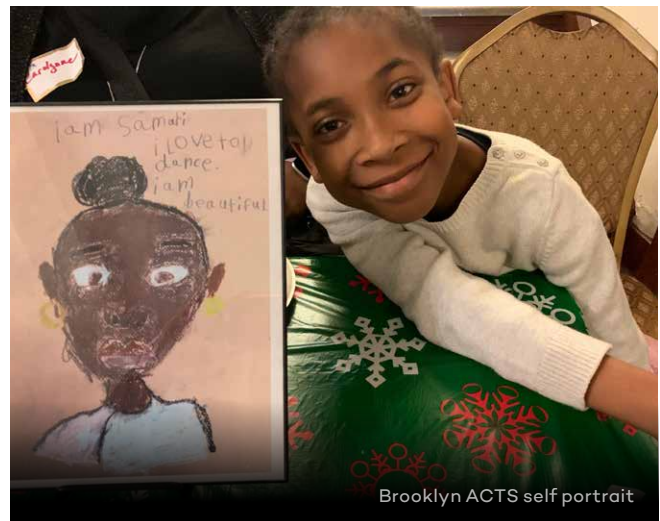
Disaster Relief

USD 70,000

For relief efforts in the Bahamas from Hurricane Dorian and in Australia from the bushfires.



Hospice of Windsor #1



Brooklyn ACTS self portrait

Grants from the Joyce Baker Legacy Fund and Mark J. Hanna Legacy Fund **USD 20,000**

Legacy Fund donors provide the resources and the recommendations for annual grants to be made in their name.



Knickers building latrine

Honoring MDRT & MDRT Foundation volunteer leaders **USD 124,000**

Member leaders are invited to identify a charity of their choice to receive a special grant funding in honor of their leadership. This includes MDRT Foundation Board of Trustees, MDRT Executive Council, Global Council, and Membership Communications Committee (MCC) leadership. Grant to MDRT Foundation affiliates. Grants honoring major donors.



Hope Haven

Board discretionary **USD 39,000**

Other charitable grants approved by the board.

Fundraising for Mission Impact

In a year of changing plans and endless pivots, the Foundation continued to fundraise and bring mission impact to MDRT meetings - this time virtually. Fundraising campaigns were reimagined in order to fit the virtual environment, while still raising much-needed funds for charity partners and the Foundation's grants programs.



Annual Meeting and Global Conference Virtual Event

Charity partner: Clean the World Foundation (CTWF)

Attendees watched Shawn Seipler, CTWF founder, discuss the importance of soap and hygiene supplies as they were serving 5 million more people during the pandemic. In lieu of an in-person meeting service project, donors who gave USD 1,000 or more received CTWF hygiene kits to assemble and distribute within their own communities. A total of 875 hygiene kits were taken to local organizations throughout the United States and United Kingdom.

The campaign raised over USD 220,000 from 500 donors, including USD 100,000 in match support from MDRT. Clean the World Foundation was awarded a grant of USD 110,200.

because
I said
I would.

MDRT EDGE Virtual Event

Charity partner: Because I Said I Would

Because I Said I Would is a social movement and nonprofit dedicated to the betterment of humanity through promises made and kept. Because I said I would offers programs that build one's character through teaching concepts like honesty, sacrifice and self-control and encourage good citizenship through volunteerism. Founder and CEO Alex Sheen chatted with meeting attendees at the Foundation's virtual booth following his presentation. The Foundation awarded a USD 25,000 grant to Because I Said I Would.

Top of the Table Virtual Event

Charity partner: EDWINS Leadership & Restaurant Institute

Brandon Chrostowski, Founder and CEO of EDWINS Leadership and Restaurant Institute, shared his belief that “every human being regardless of their past has the right to a fair and equal future” EDWINS’ mission is to give individuals who were incarcerated a foundation in the hospitality industry while providing a support network necessary for successful re-entry. This campaign raised more than USD 30,000, which included USD 25,000 directed to support EDWINS’ life changing programs.



Phonathon

In March 2020, in response to the growing pandemic, the MDRT Foundation hosted its scheduled phonathon virtually rather than in person. Over two days, 16 MDRT volunteers called their fellow members to check-in during the unprecedented time. More than 130 MDRT members recognized the growing need of charities around the globe and made a donation. This raised over USD 75,000 to help fund MDRT Foundation grants.

MDRT Gives Day

MDRT Gives Day, held on November 10, 2020, brought the global MDRT community together to support the MDRT Foundation. Fifty-six MDRT member fundraisers connected remotely with their MDRT peers and friends by hosting webinars, sharing videos and posting on social media throughout this event. Their efforts proved effective, raising over USD 263,000 from nearly 1,600 donors representing 36 countries.



MDRT FOUNDATION
MDRT
GIVES DAY
NOVEMBER 10, 2020

Financial Summary

September 1, 2019–August 31, 2020

Revenue and Support

Contributions	USD 1,577,349
In-Kind Contributions	1,021,116
Funds Appropriated from Endowment	567,005
Other Income	38,691
Total Operating Income	3,204,161

Expenses

Programs	1,688,870
Fundraising	115,513
Management and General	267,077
Direct Support from MDRT	990,755
Total Operating Expenses	3,062,215

Investment Activity

Increase in Cash Surrender Value of Contributed Policies	(137,859)
Investment Income	857,940
Net Realized and Unrealized Investment Gains	1,150,901
Funds Appropriated from Endowment	(567,005)
Investment Advisor Fees	(111,761)
Total Investment Activity	1,192,216

Temporarily Restricted Revenue

Contributions - Service Projects/Promise Appeal	6,131
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Change in Net Assets

Increase in Net Assets	1,340,293
Net Assets Beginning of Year	29,913,481
Net Assets End of Year	USD 31,253,774

2020 Annual Donors

The donors listed here are MDRT Foundation Knights who have made annual gifts between January 1 and December 31, 2020. Annual gifts can include donations, pledge payments, tributes, speaker fee donations, matching gifts, cash value of donated life insurance policies, premium payments, or appreciated securities. A complete list of donors can be found at mdrtfoundation.org.

ROYAL ORDER EXCALIBUR KNIGHT (USD 250,000 AND ABOVE)

Adrian P. Baker, DipPFS \$ #
Joyce P. Baker, LUTCF \$ #
Maria Ferrante-Schepis, CLU, FLMI \$ #
Alessandro M. Forte, FCII, FPFS \$ #
Richard L. Haas \$ #
Mark J. Hanna, CLU, ChFC \$ #
Gene L. Mahn, CLU, ChFC \$ # +
John F. Nichols, MSM, CLU \$ #
Douglas R. Peete, ChFC #
Barbara A. Pietrangelo, CFP, ChFC \$ #
Brett M. Sause, LUTCF, RFC \$ #
Thomas C. Sellin, CLU, ChFC \$ #
Brian G. Tarpey \$ #
William M. Upson, ChFC, CLU \$ #

LEGION OF HONOR EXCALIBUR KNIGHT FOUNDER (USD 100,000)

Eleanor W. Allen, CLU *
John W. Allen, CLU, ChFC *

LEGION OF HONOR EXCALIBUR KNIGHT (USD 100,000 TO 249,999)

Robelynn H. Abadie, RFC, CAP \$ + #
Eph Baker, CLU, ChFC +
Guy E. Baker, MSFS, Ph.D. *
Donald J. Benedetti \$
Jennifer A. Borislow, CLU \$
D. Scott Brennan \$ + #
Allen R. Bruce, CLU, ChFC % #
Julia R. Cheng, CFP, MBA #
Adelia C. Chung, CLU, ChFC \$ #

Robert H. Colyar, CLU, ChFC #
Lynne S. Crow, CLU, ChFC *
James V. Durkin, CLU, ChFC \$ ^ #
Marvin H. Feldman, CLU, ChFC \$ + #
H. Larry Fortenberry, CLU, ChFC \$ #
Charles Garrity, CLU, ChFC
Tony Gordon \$ #
Robert D. Hall *
Allan G. Hancock, CLU, ChFC \$ % #
Brian D. Heckert, CLU, ChFC \$ #
Sol Hicks \$
Michelle L. Hoesly, CLU, ChFC \$
Mark S. Jones \$ +
Joseph W. Jordan
Brent R. Kimball, CFP, ChFC \$ #
Lawrence F. Kolasa, CLU, ChFC \$ % #
Patricia L. Krarup, MSFS, ChFC + #
Donald M. Lawson, CLU, LUTCF #
John Marshall Lee, RHU, CFU + #
Charles D. Marks, CLU, ChFC \$ % #
Michael J. McNeil, CLU, ChFC \$ #
John R. Milam, CLU \$ \$
Warren Marshall Miller II, CLU, ChFC \$ #
Sally W. Munford, CLU, MSFS \$ #
Mitchell Wm. Ostrove, CLU, ChFC \$ + #
A. D. Pierce Jr., CLU, ChFC #
Walton W. Rogers, CLU, ChFC \$ # +
Stephen O. Rothschild, CLU, ChFC \$ + #
Jerry Rydell, CLU, ChFC \$
Robert C. Savage, CLU, ChFC #
Roger A. Seim, MSFS, CLU \$ #
Jerry D. Semler, CLU \$
James J. Silbernagel, LUTCF, CFP \$ #
Marc A. Silverman, CFP, ChFC \$
Donald F. White Jr., CLU, ChFC \$ % #

EXCALIBUR KNIGHT (USD 50,000 TO 99,999)

Owen H. Ackerman, CLU, ChFC #
Stephen D. Andersen, RHU
David C. Blake \$ #
Jack E. Bobo, CLU, FLMI *
Terrell L. Calhoun
John B. Carter, CLU *
John W. Cruikshank III, CLU
Kamal N. Daya, CLU, ChFC \$
Ronald M. De Baets, CLU *
Richard Dobson Jr., CFP \$
William H. Dodd, CLU +
Bruce W. Etherington, CLU, ChFC \$
Alphonso B. Franco, RHU, RCIS
Gregory B. Gagne, ChFC \$
Robert N. Garneau, CLU, ChFC \$
Roderick L. Geer, CLU *
Gilbert A. Haggart, CLU, LUTCF \$
Philip E. Harriman, CLU, ChFC +
David H. Hilton, CLU, ChFC *
James A. Jacobs, CLU, ChFC
Stephen Kagawa, FSS, LUTCF \$
Barry A. Kaye, CLU
Terrence H. Kral, CLU, CFP
Herbert D. Landon *
Andrew C. Lord, CLU, ChFC \$
Hawley Harris Maclean, LUTCF, CLTC
Robert V. Maloney, CLU, CFP
JoAnn M. Martin, CPA, FLMI #
R. Jan Pinney, CLU, CPCU
Thomas R. McCoy, CLTC \$
Paul S. McCready, RFC, CFP \$ %
Charles E. McDaniels, CLU, ChFC

David S. McKechnie, CLU \$ #
 Michael J. McLoughlin, QFA \$
 William E. McMann Jr.
 Dayton H. Molendorp, CLU \$
 George Nabeshima, PhD, CFP \$
 Jaydev R. Patel
 Scott S. Paterick, CLU, ChFC \$
 Marty Peters, CLU, RHU \$ % #
 George B. Pickett, JD, CLU \$ +
 John J. Prast, CAE, LLIF #
 James E. Rogers, CLU, CFP +
 Marilyn H. Rose
 Ted Rusinoff \$
 Larry J. Rybka, JD, CFP \$
 Aurora Saenz
 Arthur R. Salomon \$ %
 Walter G. Schnee III + #
 Randy L. Scritchfield, CFP, LUTCF \$
 John A. Shumski, RFC, LUTCF
 Allen A. Skogebo, MSFS, ChFC #
 Richard H. Sullenger +
 Daniel J. Sullivan
 Aleen M. Swofford, CLU, ChFC \$
 Edwin W. Thauer Jr., CLU, ChFC \$
 Jack B. Turner, CLU, ChFC \$ #
 Ross Vanderwolf, CFP \$
 Robert W. Waddell, RICP \$
 Brian P. Walsh, CLU, ChFC \$ #

PLATINUM KNIGHT (USD 25,000)

Ralph Antolino Jr., JD, CLU
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 Katy Baxter
 Regina Bedoya, CLU, ChFC
 Kathleen R. Benjamin, CFP, CPA
 Martin E. Chandler
 Timothy Daniel Clairmont, CFP, MSFS
 Rao K. Garuda, CLU, ChFC
 Simon John Gibson, DipPFS
 Julian H. Good Jr., CLU, ChFC %
 Ian Green, DipPFS
 Peter Hill, ChFC
 Michael S. Immel, LUTCF ^
 John H. Jacobs, CLU
 Robert B. Joki, CLU, ChFC ^
 Lance B. Kolbet, FSCP, LUTCF %
 Thomas F. Levasseur, CLU, MS Ed
 Leon L. Levy, CLU, CFU %
 Christopher Lim Geok Meng, ChFC, CLU
 Heather Lindsley, LUTCF, RICP
 Peter R. Magni, LUTCF %
 Frank A. Marcin, CLU, MSFS %
 Patrick G. McEntee, FLIA(dip)
 Allan T. Mendels, CLU, ChFC
 Neal K. Miller %
 Brad J. Myers
 Yuka Nakahara-Goven, MBA, CLU
 Alfred J. Opas Jr., CLU, LUTCF
 Nathan M. Perlmutter, CLU, ChFC
 Seymour Petrovsky, CLU

Arlen I. Prentice, CLU, ChFC %
 Robert V. Price Jr., MSFS, ChFC %
 Earl S. Prolman, CLU, ChFC
 Derek J. Reed, CFP, CLU
 Ann Baker Ronn, CLU, ChFC
 Jason L. Smith
 Jack Stone, BAHonACC, CertPFS %
 Laurence Turner, APFS, CFP
 Michael L. Weintraub, CLU
 David S. Weiss Jr., CLU, ChFC
 Michael J. Wolfe, CLU, MSFS

DIAMOND KNIGHT (USD 10,000)

Mohamad Manmohan Abdullah, ChFC, CLU %
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 Emmette F. Albritton, LUTCF, FSS
 Michael P. Austin, CFP, ChFC %
 Paul S. Avenius, CLU, ChFC
 Odon L. Bacque Jr., CLU
 David L. Bailin, CLU, ChFC %
 Caroline A. Banks, FPFS %
 James T. Bardin, CLU, ChFC
 Mark L. Begley, CLU, ChFC
 Robert L. Belvedere, CFBS, LUTCF %
 Stuart J. Birkel, CSA %
 Steve Blake, CLU, ChFC
 Wendy Boyd
 Morwenna M. Clarke, CFP, ALIA(dip)
 Carmine Corino, CLU, CFP ^
 Donald E. Culver, CLU, ChFC %
 Mayur T. Dalal, MBA %
 Jeffrey Allan Dawson, CLU, ChFC \$ *
 Paul L. De Lisio, CLU, MSFS
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 Anthony Di Bernardo %
 Ryan Diachok
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 Brad Elman, CLU, ChSNC
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 Leo J. Feeney Jr.
 Mathew Paul Gale, CFP, FChFP
 B. J. Gililand %
 Richard E. Graham, CFP %
 William E. Griffith, CLU, ChFC
 Kristen E. Gulbran, CLU, ChFC
 Jeffrey Hamblen, CLU, ChFC
 Terry K. Headley, LUTCF, FSS
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 David T. Hibshman, CFP, CPA %
 Bryon A. Holz, CLU, ChFC %
 John W. Homer, CLU, ChFC
 Jason L. Hooz, CLU, ChFC
 Dave Hunter, CLU, ChFC
 Edward S. Jamieson, CLU
 Bryna A. Kanarek, RICP, ChFC %
 R.J. Kelly, AEP, MSFS
 Lynn G. Kenworthy, CLU %
 Meredith Gail Langus,

FSCP, LUTCF %
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 Curtis L. Matlin, CLU, ChFC %
 Barry McBride, CLU, AEP
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 Elaine Milne, DipPFS, DipPFS %
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 Craig Palfrey, CFP
 Gregg C. Parker, CLU %
 Jack Peckinpugh, CLU, ChFC
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 David Pritchard, DipPFS
 Timothy L. Ramsier, CRPC %
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 Thomas E. Space, CFP, LUTCF %
 Masashi Sunada %
 Eric K. Takao, CLU, MSFS %
 Roger G. Taylor, CLU, ChFC
 Gregory M. Telge, CFP, MSFS
 Robert W. Terry, CLU, ChFC
 Peggy Tsai, RFP, CCFP
 Steven Valerius, FLMI
 Thomas H. Waring Jr., CLU, ChFC
 Stephen B. Wechsler, CLU
 Jeremy Mark Wellington, DipPFS, DipCII
 Helen Jayne West, APFS
 R. Michael Whittenburg, CLU, ChFC %
 Kirk Wilkerson %
 David R. Wilson, CLU
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 Gary Wolff, CLU, ChFC
 Pecky Wong So Ping, FChFP, MBA %
 Aurora Say Yao %
 James D. Yurman, CFU %
 Carl W. Zeidler, CFP, MSFS %

GOLD KNIGHT (USD 5,000)

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 J. Peter Benet, CLU, CFP
 John R. Benton Jr., ChFC, CLTC
 Bruce P. Bessner, CFP, LUTCF
 Ronald L. Bland
 Daniel M. Boardman, CLU, CFP %
 Bradley H. Bofford, CFP, ChFC
 Layne Jeffrey Brown, ChFC, CLU
 Dr. Richard King Brown ^
 Kimberly Brumbaugh, LUTCF %
 Kenneth Buckley %
 David T. Buckwald, CLU, CFP %

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William P. Chiu, CLTC, PhD
Peter M. Coghill
Thomas J. Cohn, CLU, ChFC
Scott C. Curran, CLU, ChFC
Jay M. De Finis, CLTC %
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John J. Demboski, CFP
Patrick A. Di Cerbo, CFP, ChFC %
Robert K. Drake, CLU, ChFC %
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William J. Egan III, CFP, CLU
Susan M. Ellis, CFP
Kapsun C. Enders
Anthony G. Engrassia, ChFC, LUTCF
John P. Enright %
Luther Glenn Ensminger Jr., ChFC, CLU %
Samuel B. Fields, LUTCF
Scott A. Fligel, CFP, ChFC
Jane B. Fontaine, CFP, ChFC
Mark E. Frieze, CMFC
Chee Hong Gan, ChFC, CLU %
Norman Dale Gaston
Brendan J. Glennon, QFA, FIB
Steven D. Goodwin
Stan E. Graber, CLU, LUTCF %
Charlene K. Granstra, CLU, ChFC
Kevin M. Grunawalt, CFP, LUTCF
David F. Gwynn, CLU, ChFC
Aaron L. Hammer, LUTCF ^
Richard B. Hanson, FICS, LUTCF
Marcus T. Henderson Sr., RFP, MRFC
Michael G. Herman, ChFC, RICP %
Kelly G. Herring, CLU, ChFC
C. Richard Herrold, CLU, CFP
Gail R. Hill, CLU, ChFC %
Edward D. Hinds, CLU, CFP %
Matthew T. Hoesly, CFP, ChFC
Carleton Hollister %
Todd D. Hruby, LUTCF %
Kenichi Ibuki
Shuhei Ino %
John R. Jagger, CLU, ChFC
Sherry D. Johnson, CFP
Anthony Matthews Jones, BSc(Hons), QFA
Michael J. Jungen, ChFC, CFP
Walter E. Katz, CLU, CFP
Carol Kheng, ChFC
Frank C. Kinter Jr., CLU, ChFC
Michael R. Kinzie, CLU, ChFC
Marta Borbala Kiraly
Kobus Kleyn, CFP, TEP %
Patrick L. Knueven, CLU, ChFC
Michael D. Kolacz, CEP, LUTCF %
Terri E. Krueger %
Priti Ajit Kucheria, LUTCF, CFP ^
Lanny N. Kuehl, CLU, ChFC
Christian E. Laver, RFC %
Terry K. Lewis, CLU, ChFC
Douglas J. Licari, CFP, CLU

James E. Linus, CFP %
Paul F. Love, CLU, ChFC
William G. Loventhal III, CLU, CFP
Yuen-Yee Chan Ma, CLU, CFP
Jeanne Malone %
Jennifer P. Mann, MBA, CFP
Dr. Bronwyn L. Martin, PhD, ChFC %
Ronald F. Mayer, CLU, ChFC
Richard E. McDaniel, CLU, LUTCF
Dale McLeod, RFC
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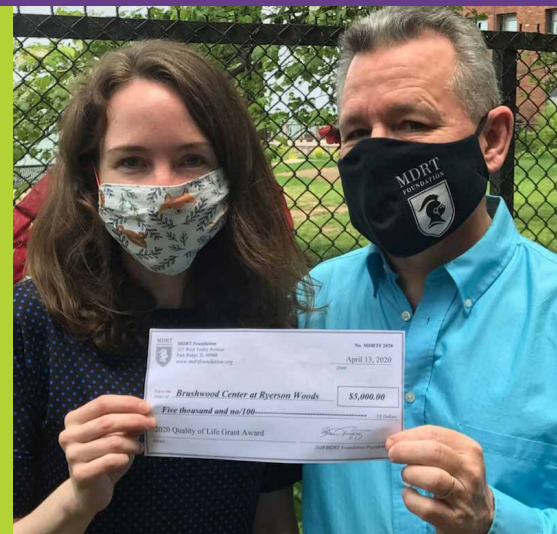
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