



**MDRT
FOUNDATION**
Financial Professionals
Changing Lives Worldwide™

Our Impact

MDRT Foundation 2018 Annual Report



Impact

In 1956, MDRT President Arthur F. Priebe, CLU, directed a corporate charitable gift in his honor to support the local community, which led to the creation of the MDRT Foundation a few years later. Over the years, MDRT members pooled their resources together to strengthen this newly founded charitable organization.

Looking back over 2018 and our 59-year history, the impact of one member many years ago has grown, but it still remains every MDRT member's opportunity. Hundreds of MDRT members volunteer with the Foundation each year, and thousands of members contribute financially.

In 2018, our endowment reached the target value to begin distributing income, an exciting milestone for the MDRT Foundation. The leadership of the Foundation believes strongly in creating an impact with the charities and causes our members care the most about, so we created a new grant: the Impact Grant. The grants committee and the board of the Foundation select charities that have been recommended by members to receive additional funding due to the impressive programming they offer their constituents. We want to help them create more impact!

It is a blessing and an honor to be a part of an organization with so many members committed to giving so much of what they

have to impact the lives of others. We look forward to celebrating our 60th year with you, we and have some amazing new ways to bring even greater impact to those who need it most.

On behalf of every person around the world impacted by the generosity of the support of the MDRT, its members, industry partners and Foundation sponsors — thank you!



A handwritten signature in black ink, appearing to read "Ted Rusinoff".

Ted Rusinoff

2019 MDRT Foundation President





Sally's Impact

Comprehensive
Learning Center –
Warminster, Pennsylvania
United States





What do you do when a cause becomes important to you?

For Joanne Corless of Wycombe, Pennsylvania, it meant starting her own foundation after her son AJ was diagnosed with autism spectrum disorder at the age of 2. Two decades later, the AJ Foundation has worked to develop educational services to help the lives of people with autism and their families, including the creation of the Comprehensive Learning Center (CLC). This private school for children with autism is where AJ and countless other students have developed skills to live and thrive independently as adults.

Sixteen years ago, **Sally Hoffman**, an eight-year MDRT member from nearby Richboro, Pennsylvania, knew little about autism and had never interacted with a child with the disorder.

That was until Daniel, an 11-year-old with autism, and his family moved into her neighborhood. Since then, Hoffman has not only become close friends with Daniel and his family but seen how the CLC has helped to guide and support Daniel and his parents.

"Daniel is employed and more socially integrated as a result of the training at CLC," Hoffman said. "And as far as my perception of people with autism, I now have an appreciation for the struggles they conquer."

It is with that bond and appreciation in mind that Hoffman secured a USD 2,500 grant for CLC through the MDRT Foundation to help expand the center's technological offerings. "At fundraising events, you hear directly from families how dramatically their lives have changed once they enroll their child in the CLC," Hoffman said. "These personal stories tug at your heart."



MDRT Foundation Worldwide Grant



USD 2,500



Sally Hoffman



Please note this land is privately owned

Drop Off Only

10 Minutes Maximum



Laurence's Impact

Whiteknights Yorkshire
Blood Bikes –
West Yorkshire,
England





If blood, plasma, tissue samples, body fluids and breast milk only needed to be transported between hospitals, hospices and supply facilities during regular business hours, there would be no problem.

Of course, health and medicine are 24/7. That is where Whiteknights Yorkshire Blood Bikes comes in. Funded entirely by donations and executed by volunteers, the organization ensures, through a fleet of trained motorcycle delivery riders, that sensitive medical materials get where they need to be when they need to be there.

For volunteers like **Laurence Turner, CFP, APFS**, a 17-year MDRT member from Halifax, England, that means, for example, a night when a blood testing machine and its backup went out of service.

Delivering all blood samples taken between 7:30 p.m. and 6:30 a.m. the next day, Turner made 17 trips throughout the night, taking very short breaks to sleep on chairs in a staff room at the hospital in between jobs.

"I was so, so tired when I got home the following morning but felt so proud of my little self," Turner said. "No patient nor any doctor knew how their samples traveled through the cold, dark November night from one hospital to another so that they could be tested and results provided."

That dedication, which has driven Turner to make more than 300 deliveries since his first shift in June 2017, led him to secure a USD 5,000 grant from the MDRT Foundation to upgrade Whiteknights' fleet of bikes.



MDRT Foundation Quality of Life Grant



USD 5,000



**Laurence Turner,
CFP, APFS**

852





Nuria's Impact

Nosotros por los
Ninos con Cancer –
Guadalajara, Mexico





It is impossible to quantify the awfulness of a child being diagnosed with cancer. Yet a family unable to pay so that child can be treated takes the situation to an even more unimaginable and scary level.

That is what makes groups like Nosotros por los Ninos con Cancer so important. Founded in 1999 in Guadalajara, Mexico, the nonprofit organization helps families pay for chemotherapy, diagnostic and laboratory studies and more, while also providing emotional support to children with cancer and their families.

Nuria Casulleras Ascencio, a 19-year MDRT member also from Guadalajara, has supported the organization since its inception. She recently expanded her involvement by securing a USD 5,000 MDRT Foundation grant to enhance Nosotros Por Los Ninos Con Cancer's equipment in the hematology and oncology unit.

Asked to describe what the organization means to her, Casulleras marvels at the strength of parents able to provide hope to their children and keep a smile on their face despite the fear in their eyes. She also notes the volunteers' efforts to support the entire family — as everyone in the family is impacted when a child has cancer.

"As soon as I learned about them, I felt the need to help," Casulleras said. "They teach me that barriers don't exist in life. The organization started with nothing, and they continue to help more and more families."

Since 1999, Nosotros Por Los Ninos Con Cancer has served more than 1,300 children and their families.



**MDRT Foundation
Worldwide Grant**



USD 5,000



**Nuria Casulleras
Ascencio**



2018 MDRT Foundation by the Numbers

Measuring Impact

270 GRANTS AWARDED

1.49M TOTAL USD AWARDED TO CHARITABLE PROGRAMS

27 COUNTRIES THAT RECEIVED GRANTS

650

members engaged in the Foundation's board, committees, fundraising initiatives, service projects and educational forums

1.79M

contributions received from

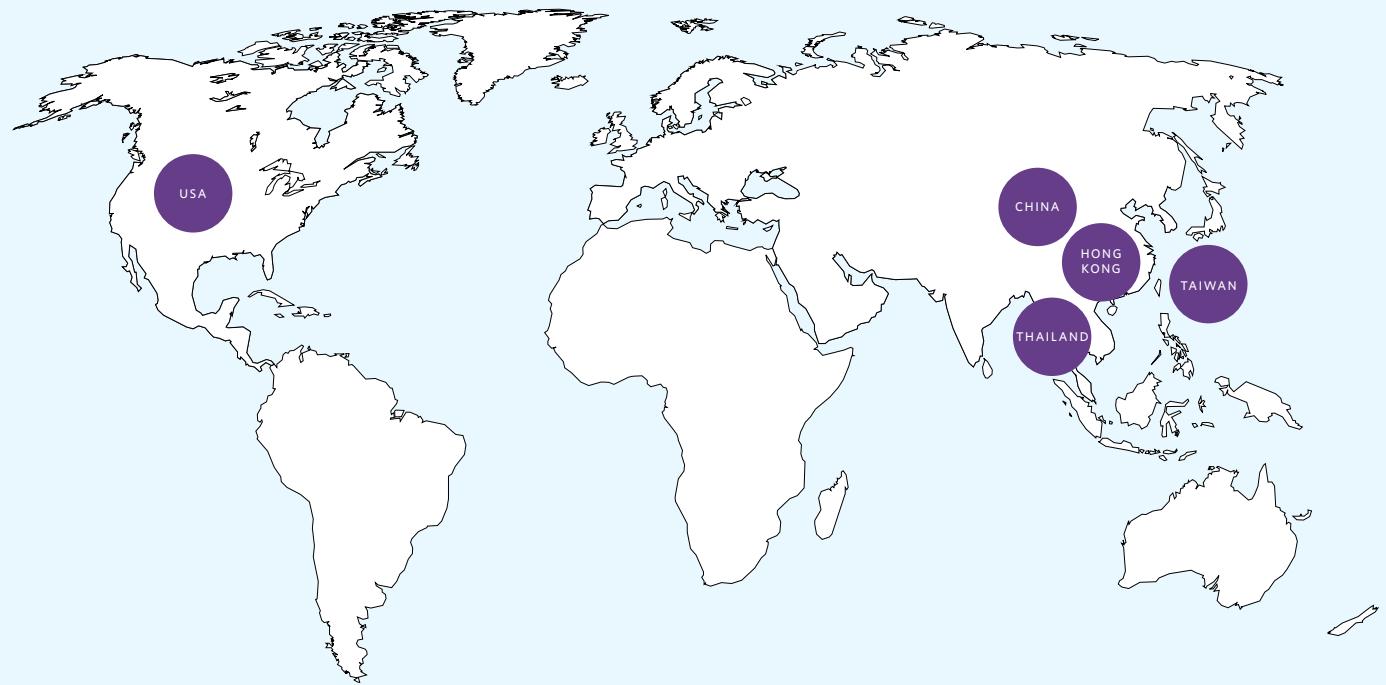
3,437

individual and corporate donors from

44

countries.

2018 Donor Countries



Countries with highest donor representation (in order): United States | China | Hong Kong | Thailand | Taiwan

| | | | | | |
|-----------|----------------|-------------|-------------|-------------------|----------------------|
| Argentina | Canada | India | Macau | Republic of Korea | Trinidad and Tobago |
| Australia | Cayman Islands | Indonesia | Malaysia | Scotland | United Arab Emirates |
| Bahamas | China | Ireland | Mexico | Singapore | United States |
| Bahrain | England | Israel | New Zealand | South Africa | Uruguay |
| Belgium | Greece | Jamaica | Pakistan | Spain | Vietnam |
| Belize | Hong Kong | West Indies | Panama | Sri Lanka | Wales |
| Brazil | Hungary | Japan | Philippines | Taiwan | |
| Brunei | | Lebanon | Poland | Thailand | |

Charity Partnerships

The MDRT Foundation brought its mission of member engagement and community impact to all major MDRT member meetings held in 2018.



Algalita Marine Research and Education

Of the more than USD 53,000 in donations raised at the **MDRT Top of the Table Annual Meeting** in Kauai, Hawaii, nearly

USD 30,000 was directed by donors to charity partner Algalita.

As a pioneer in the study of plastic pollution, Algalita was the first to research methodology for collecting and analyzing plastic samples from the ocean. Algalita realized that to make a real difference with plastic pollution, they would focus

on educating future generations. Algalita provides individualized support for students and teachers interested in finding their place within the movement to combat plastic pollution.

At an educational workshop, Algalita's executive director, Katie Allen, told Top of the Table attendees the goal is to think about how to be more responsible with the material. "We're not fighting evil; we're fighting an addiction to convenience," Allen said.



Operation Smile Thailand

The MDRT Foundation supported Operation Smile Thailand (OST) to recognize the host country at the **MDRT Experience and Global Conference** in Bangkok. OST provides free surgery for Thai children born with a cleft lip, cleft palate or other facial deformity. In as little as 60 minutes, and for approximately USD 785, one cleft lip surgery can change a child's life forever.

More than 100 volunteers created "smile care bags" for patients which included post-surgery necessities, a handmade blanket and greeting cards.

Life is Good Kids Foundation

Life is Good Kids Foundation founder and chief playmaker Steve Gross delivered a keynote address at the **MDRT EDGE** about the power of optimism. Gross was presented with a check for USD 25,000 to support the Life is Good Kids Foundation's signature Playmaker Program. This program supports the men and women who dedicate their careers to helping children heal from the devastating impact of early childhood trauma.

More than 100 conference attendees volunteered to pack 500 gratitude packages (including Life is Good shirts and Dunkin' gift cards) to send to teachers, nurses and social workers engaged in the Playmaker program all across the Boston area.



Fundraising Impact

MDRT members across the globe impacted the Foundation's mission by volunteering with fundraising campaigns.



The Exodus Road

The 2018 **MDRT Annual Meeting** partner, The Exodus Road, works hand-in-hand with local police to free trafficking victims and arrest offenders in India, Latin America, Southeast Asia, and the United States. With the aid of cutting-edge cyber technology, The Exodus Road is able to impact larger organizations of criminal activity.

Human trafficking happens around the globe. Many citizens don't understand the realities of it and may not know what to do if they suspect it's happening in their own communities.

Following his presentation on Main Platform, The Exodus Road CEO Matt Parker led an innovative training course that equipped members with the information to counter trafficking in their own neighborhoods. More than USD 252,000 was raised at the meeting.



"A highlight of 2018 was the check presentation to The Exodus Road. The MDRT Foundation board had agreed to double the amount awarded to The Exodus Road, using a distribution from the endowment. This was a major milestone for the Foundation and a big surprise to The Exodus Road founders Matt and Laura Parker. It meant MDRT members' impact would be even more significant in the fight to stop global human trafficking."

2019 MDRT Foundation President
Ted Rusinoff

Phonathon

The annual MDRT Foundation Phonathon was hosted by One America in Indianapolis, Indiana, in February 2018. Eighteen MDRT volunteers spent two days reaching out to members to raise funds for the global grant programs. **More than USD 360,000 was raised in cash and pledges.**



Phonathon volunteers also found time to give back locally by serving meals at the Ronald McDonald House at Riley Hospital for Children. They served two meals to dozens of families of children receiving treatment at the hospital.

MDRT Gives Day

The second annual MDRT Gives Day united the global MDRT community to give back online on October 23, 2018. Thirty-nine MDRT members participated by making personal fundraising webpages which they shared with their network of MDRT members, colleagues, friends and family as they asked for donations to the MDRT Foundation. **The event raised more than USD 160,000 from nearly 800 donations in 35 countries.**

Foundation Booth

Dozens of MDRT member volunteers brought smiles and fundraising energy to the MDRT Foundation booth at the 2018 MDRT Annual Meeting in Los Angeles, California. **Asking for donations to the MDRT Foundation's campaign for The Exodus Road, they helped engage more than 1,400 donors from 35 countries.**

Making an Impact Across the Globe with MDRT Foundation Grants

In 2018, the MDRT Foundation awarded 270 grants to charitable programs worldwide, totaling USD 1,491,776. These grants comprise several funding programs:



God's Promise in Haiti

Quality of Life grant program

USD 250,000 awarded

Honors the member's volunteerism with the charity

By application process and endorsed by a member of MDRT

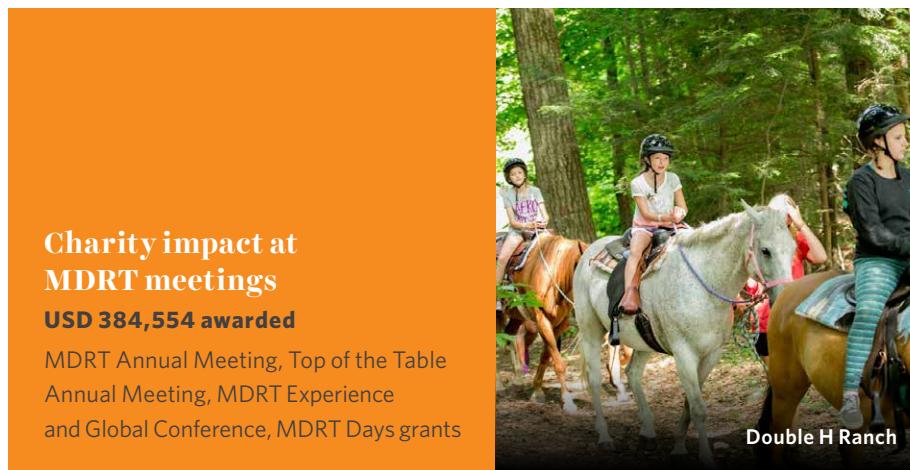


Covenant Mercies

Worldwide grant program

USD 528,000 awarded

By application process and endorsed by a member of MDRT



Double H Ranch

Charity impact at MDRT meetings

USD 384,554 awarded

MDRT Annual Meeting, Top of the Table Annual Meeting, MDRT Experience and Global Conference, MDRT Days grants



American Red Cross - Puerto Rico

Disaster relief and emergency funding grants

USD 210,000 awarded

Awarded in response to series of hurricanes and earthquakes impacting regions in Central and North America in 2018: Hurricanes Harvey, Irma and Maria, and earthquake in Mexico.

An emergency fund allowed members to submit recommendations for grants to be given to charities providing relief in affected areas where immediate assistance was needed most.



Honoring MDRT & MDRT Foundation volunteer leaders USD 99,222 awarded

In honor of their volunteer service, MDRT Foundation's Board of Trustees, MDRT's Management Council and Membership Communications Committee (MCC) leadership are given the opportunity to identify a charity to receive grant funding.



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

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

Financial Summary

September 1, 2017-August 31, 2018

Revenue and Support

| | |
|-----------------------------------|------------------|
| Contributions | 1,840,743 |
| In-Kind Contributions | 955,091 |
| Funds Appropriated from Endowment | 129,101 |
| Other Income | 9,671 |
| Total Operating Income | 2,934,606 |

Expenses

| | |
|---------------------------------|------------------|
| Programs | 1,491,776 |
| Fundraising | 68,925 |
| Management and General | 305,493 |
| Direct Support from MDRT | 914,237 |
| Total Operating Expenses | 2,780,431 |

Investment Activity

| | |
|--|------------------|
| Increase in Cash Surrender Value of Contributed Policies | 254,060 |
| Investment Income | 518,912 |
| Net Realized and Unrealized Investment Gains | 689,020 |
| Funds Appropriated from Endowment | (129,101) |
| Investment Advisor Fees | (129,114) |
| Total Investment Activity | 1,203,777 |

Temporarily Restricted Revenue

| | |
|---|--------|
| Contributions - Service Projects/Promise Appeal | 51,308 |
|---|--------|

Change in Net Assets

| | |
|-------------------------------|-------------------|
| Increase in Net Assets | 1,409,260 |
| Net Assets Beginning of Year | 28,534,895 |
| Net Assets End of Year | 29,944,155 |

2018 Annual Donors

The donors listed here are MDRT Foundation Knights who have made annual gifts between January 1 and December 31, 2018. Annual gifts can include donations, pledge payments, tributes, speakers fee donations, matching gifts, cash value of donated life insurance policies, premium payments or appreciated securities. To see a complete list of 2018 donors, please visit mdrtfoundation.org

Royal Order

Excalibur Knight (USD 250,000 and above)

Adrian P. Baker, DipPFS \$#
Joyce P. Baker, LUTCF \$#
Maria Ferrante-Schepis, CLU \$#
Alessandro M. Forte, DipPFS, CSP \$##
Richard L. Haas \$#
Mark J. Hanna, CLU, ChFC \$#
Gene L. Mahn, CLU, ChFC \$+ #
John F. Nichols, MSM, CLU \$#
Douglas R. Peete, ChFC
Barbara A. Pietrangolo, 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)

Robelyn H. Abadie, RFC, CAP \$+ # %
Eph Baker, CLU, ChFC *
Guy E. Baker, MSFS, CFP +
Donald J. Benedetti \$
Jennifer A. Borislows, 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, CFP, CLU \$#

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 \$ #

Solomon 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 M. Lee, CLU, CFU \$+ #

Charles D. Marks, CLTC, ChFC \$ #

Michael J. McNeil, CLU, ChFC \$ #

John R. Milam, CLU \$ #

W. 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 \$

Ronald M. De Baets, CLU * #

H. Richard Dobson Jr., CFP \$

William H. Dodd, CLU +

Bruce W. Etherington,
CLU, 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 \$

Barry A. Kaye, CLU

Terrence H. Kral, CLU, CFP

Herbert D. Landon *

Andrew C. Lord, CLU, ChFC \$

Robert V. Maloney, CLU, CFP

Paul S. McCready, RFC, CFP \$

Charles E. McDaniels, CLU, ChFC

William E. McMann Jr. \$

Dayton H. Molendorp, CLU

Jaydev R. Patel

Marty Peters, CLU, RHU \$

Sarah J. Kaelberer, CFP, ChFC

Stephen Kagawa, FSS, LUTCF

Lance B. Kolbet, RHU, LUTCF

Edward E. Leisher, CLU %

Leon L. Levy, CLU, RHU %

Peter R. Magni, LUTCF

Frank A. Marcin, CLU, MSFS %

JoAnn M. Martin, CPA, FLMI

Thomas R. McCoy, CLTC

Patrick G. McEntee, FLIA(dip)

James M. McEvoy, CLU, AEP

David S. McKechnie, CLU

Michael J. McLoughlin, QFA ^

Brad J. Myers

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Alfred J. Opas Jr., CLU, LUTCF

Scott S. Paterick, CLU, ChFC

Seymour Petrovsky, CLU

Harry Phillips III, CLU, CPCU

James D. Pittman, CLU, CFP

Arlen I. Prentice, CLU, ChFC

Platinum Knight

(USD 25,000)

Brian H. Ashe CLU

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Katy Baxter

Kathleen R. Benjamin, CFP, CPA

David C. Blake

Lyle L. Blessman *

R. S. Briggs, CLU, ChFC

Martin E. Chandler

Peter F. Cote, EPC

John D. De Maria, CLU, ChFC

Timothy D. Foster

Steven K. Freil, CLU, CFP

Gregory B. Gagne, ChFC

Rao K. Garuda, CLU, ChFC

Millard J. Grauer, CLU, ChFC * %

Ian James Green, DipPFS

Peter Hill, ChFC

Lewis D. Jacobs, CLU, ChFC %

Robert B. Joki, CLU, ChFC %

Sarah J. Kaelberer, CFP, ChFC

Stephen Kagawa, FSS, LUTCF

Lance B. Kolbet, RHU, LUTCF

Edward E. Leisher, CLU %

Leon L. Levy, CLU, RHU %

Peter R. Magni, LUTCF

Frank A. Marcin, CLU, MSFS %

JoAnn M. Martin, CPA, FLMI

Thomas R. McCoy, CLTC

Patrick G. McEntee, FLIA(dip)

James M. McEvoy, CLU, AEP

David S. McKechnie, CLU

Michael J. McLoughlin, QFA ^

Brad J. Myers

George Nabeshima, PhD, CFP

Alfred J. Opas Jr., CLU, LUTCF

Scott S. Paterick, CLU, ChFC

Seymour Petrovsky, CLU

Harry Phillips III, CLU, CPCU

James D. Pittman, CLU, CFP

Arlen I. Prentice, CLU, ChFC

Robert V. Price Jr., MSFS, ChFC %

Earl S. Proelman, CLU, ChFC

Derek J. Reed, CFP, CLU

Ann Baker Ronn, CLU, ChFC

Ted Rusinoff

W. Thomas Spencer Jr., CLU, ChFC

Jack Stone, BAHonACC, Cert PFS %

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Rick Thomas, CLU %

Ross Vanderwolf, CFP

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Michael L. Weintraub, CLU %

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Michael J. Wolfe, CLU, ChFC

Carmine Corino, CLU, CFP

John T. Cross

Donald E. Culver, CLU, ChFC

Mayur T. Dalal, MBA %

Paul L. De Lisio, CLU, MSFS

James R. Denny III, CLU, ChFC

Anthony Di Bernardo %

Anthony J. Domino Jr.,

ChFC, MSFS %

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Brad Elman, CLU, CLTC %

Barry E. Epstein, CLU, ChFC %

Curtis L. Eskew Jr., CLU, CLTC

Glen C. Farr, CLU, ChFC %

Jo Ann E. Favia, CLU, ChFC

Rudi Thomas Floyd, CLU, ChFC

Kevin A. Foreman, CFP, FIC

Grant E. Foster, CLU, ChFC

Samuel David Friedman

Mathew Paul Gale, CFP, FChFP %

Mark S. Gauna, GBA %

Simon John Gibson, DipPFS

B. J. Gililland %

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Joan Halstead, CLU, ChFC

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Michael S. Immel, LUTCF

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Yasuhiro Koba

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Scott Roger Lebin, RFC, CWS

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Yuka Nakahara-Goven, MBA, CLU
Keng Kwang Keith Ng %
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Gregg C. Parker, CLU %
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Masashi Sunada
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Laurence Turner, APFS, CFP
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Dharmesh Vora
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Jeremy Mark Wellington,
DipPFS, Dip CII
Helen Jayne West, APFS
Kirk Wilkerson
David R. Wilson, CLU
Brian P. Winfield Sr., CLU, AEP
Pecky Wong So Ping, FChFP, MBA
Aurora Say Yao ^
James D. Yurman, RHU %
Carl W. Zeidler, CFP, MSFS

Gold Knight (USD 5,000)

John D. Akare, CLU, CLTC
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ChFC, CLU
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Debbie Andrews, FSS
David Eric Appel, CLU, ChFC
Alfonso V. Aveilla, LUTCF
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Daniel J. Balogh, CLU ^
Rakesh R. Bansal, LUTCF %
William D. Barnes, LUTCF, CLTC
Howard L. Barto, CLU, ChFC
Gus Bates III, CLU
William T. Beemer, CLU, ChFC
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J. Peter Benet, CLU, CFP
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Bruce P. Bessner, CFP, LUTCF
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Terry L. Breitbord, CLU, ChFC
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C. Robert Brown, CLU, LUTCF
Kimberly Brumbaugh, LUTCF %
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James L. Butler, MSFS, CFP %
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Curtis V. Cloke, LUTCF, RICP
Irwin C. Cohen
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John J. Cranley III, CLU, MSFS
Howard D. Crissey, CLU, ChFC
Roy B. Crown
Steven M. Daniel, CLU, ChFC
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James R. Delamater, CLU, ChFC
John D. Dempsey, CLU, ChFC
Robert A. Derrenbacker, CLU, ChFC
Frank A. Donnelly Jr., CLU
Robert K. Drake, CLU, ChFC
William S. Dukes
James A. Dyer
William J. Egan III, CFP, CLU
Susan M. Ellis, CFP %
Anthony G. Engrassia, ChFC, LUTCF
John P. Enright
Luther Glenn Ensminger Jr.,
ChFC, CLU

Robert L. Erkel, CFP, CLU
G. Randall Eschels, CLU, CFP
Lee E. Evans
David J. Feldman, CLU, ChFC
Tony Feliciano, ChFC
Tim C. Fitzgerald, MSFS, AEP %
Scott A. Fligel, CFP, ChFC
Gregg T. Fujimoto, CLU, CFP
Nobuyuki Fukumoto
Lawrence J. Ganim, RIA, CIC
Norman Dale Gaston
William P. Gettings, CLU, CFP
Alan H. Goldenberg, CLU, ChFC
Steven D. Goodwin
Stan E. Graber, CLU, LUTCF %
Kenneth A. Grace, CLU
Richard E. Graham, CFP
George R. Grossmann, LUTCF
Kevin M. Grunawalt, CFP, LUTCF
Elwyn D. Guernsey, CLU, ChFC
Kristen E. Gulbran, CLU, ChFC
David F. Gwynn, CLU, ChFC
Mukund M. Hanumante, Ph.D., CLU
Tom Hegna, CLU, ChFC
Frank G. Heitker, CLU, FLMI %
Richard C. Hemphill, CRPS, CSA %
C. Richard Herrold, CLU, CFP
Gary F. Heuer, FICS
David T. Hibshman, CFP, CPA
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Our Mission

The MDRT Foundation is the charitable arm of the Million Dollar Round Table (MDRT). A global 501(c)(3) grant-making organization exclusive to MDRT members, the MDRT Foundation's mission is to increase member and industry participation and to provide funds to worthwhile charitable organizations throughout the world.

Since 1959, the MDRT Foundation has made an impact by contributing more than USD 34 million to charitable projects in 70 countries and all 50 United States.

Embodying MDRT's Whole Person concept, the MDRT Foundation has engaged members to give their time, talents and treasures to support charities through donating, volunteering and endorsing applications for grant funding.

MDRT Foundation Staff

Angela Allegretti
Grants Coordinator

Caryn Henning
Donor Relations Coordinator

Karen Matts
Global Development Manager

Michele L. Stauff, CFRE
Executive Director

Jill Silver Topolski
Donor Operations Associate

You Can Make an Impact. Endorse a Grant Application.

As diverse as the charities funded by the MDRT Foundation are, what they all have in common is a connection to an MDRT member. All charity applicants seeking funding from the Worldwide or Quality of Life grant programs must be accompanied by a letter of endorsement from an MDRT member.

Steps for the MDRT member

1

First, identify which program is the best fit based on your relationship with the charity.

Quality of Life Grants:

For members who are actively involved as a volunteer with the charity.

Worldwide Grants:

For members who may not be a volunteer with the charity, but are familiar with the issue or program and wish to endorse their application for funding.

2

Next, write a letter of endorsement.

State why you think the MDRT Foundation should award a grant to the charity.

3

Then, contact the charity.

Point them to mdrtfoundation.org to submit a grant application via the online process. The charity representative will need the member's name, MDRT member ID number and letter of endorsement.

The annual deadline for applications to be considered for funding in the next year's grant cycle.

September 1

More details can be found on the MDRT Foundation website: mdrtfoundation.org