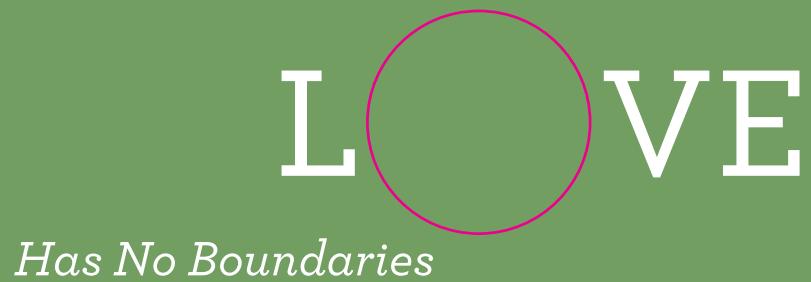


NO BOUNDARIES



MDRT Foundation 2014 Annual Report



2014 PROMISE APPEAL

Love Without Boundaries

China

During the 2014 MDRT Annual Meeting, June 8–11 in Toronto, Ontario, Canada, MDRT members generously contributed to the Promise Appeal, raising USD 229,000 to support the MDRT Foundation's global grant programs including Love Without Boundaries. The MDRT Foundation awarded a USD 100,000 grant to Love Without Boundaries.

Love Without Boundaries is a nonprofit organization that provides life-saving medical care, education and foster care programs for children from impoverished communities in China.





ADOPTION

Has No Boundaries

2014 PROMISE APPEAL

Love Without Boundaries

China

During Main Platform, 25-year MDRT member and Excalibur Knight **Donald F. White, CLU, ChFC**, shared his inspirational story of the adoption of his twin daughters from China.

During an MDRT Foundation service project in China in 2004, White was moved by a visit he made to an orphanage run by Love Without Boundaries.

The following year, White and his wife returned to China to adopt their twin infant daughters, who had been abandoned at an orphanage. Today, Reagan and Sydney are happy and healthy 11-year-olds, and White is grateful for his forever family.

EDUCATION



Has No Boundaries

MDRT FOUNDATION GRANT

Covenant Mercies

Uganda, Africa

Julius was 5 years old when his father died. After his father's death, Julius' mother had no income and struggled to provide the basic necessities for her family. In Uganda, even basic school supplies became luxuries that were no longer affordable.

MDRT Foundation-funded Covenant Mercies operates programs in Uganda to support children from underserved communities. Julius was soon able to enroll in a good school with his tuition fully paid. As a result of his hard work, Julius qualified for a full government scholarship and now attends one of Uganda's premier universities, where he is studying Informational Technology.

This USD 5,000 MDRT Foundation grant was endorsed by
18-year MDRT member and MDRT Foundation Gold Knight
John D. Dempsey, CLU, ChFC, from Elmer, New Jersey, USA.





MENTORSHIP

Has No Boundaries

TOP QUALITY OF LIFE AWARD

Big Brothers Big Sisters of the Bay Area

California, United States

As a volunteer for Big Brothers Big Sisters of the Bay Area, **Alan H. Goldenberg, CLU, ChFC**, has mentored seven at-risk boys, as well as served in a volunteer leadership position on the organization's board of directors.

During the 2014 MDRT Annual Meeting, the MDRT Foundation awarded Goldenberg, a 28-year MDRT member and MDRT Foundation Silver Knight of Walnut Creek, California, USA, with the 2014 Top Quality of Life Award in honor of his many years of mentoring for Big Brothers Big Sisters of the Bay Area.

In his honor, a USD 25,000 Quality of Life Grant was awarded to Big Brothers Big Sisters of the Bay Area.

"I think I have been able to help all of these young men achieve more in their lives than they otherwise might have been able to," Goldenberg said.

YOU HAVE NO BOUNDARIES

Hope, independence, happiness, love and opportunity – these are just some of the universal values that have no boundaries. Our universal values bring us closer as a global family and remind us that we are all in this together.

Since 1959, the Million Dollar Round Table Foundation has awarded more than USD 29 million to a diverse range of charitable causes endorsed by MDRT members. Funded by generous donations from MDRT members and industry supporters worldwide, our global grant programs know no boundaries.

The featured grant stories show just some of the ways that MDRT Foundation supporters are creating a world without boundaries by giving back to people in need. Our language, culture and customs may differ, but our belief that one person can make a difference translates to all.

Planting compassion worldwide.



Growing up in Ohio, USA, I learned the story of Johnny Appleseed, a young man who wandered the Ohio and Midwest countryside planting apple trees. Although it has been more than 100 years since these seeds were put in the ground, many orchards are still producing fruit today. Appleseed's legacy has provided fruit for generations in each community he visited.

The MDRT Foundation is a lot like the story of Johnny Appleseed. No, we don't plant apple trees in every town, but we do help you make an impact in your community. We are not restricted by country borders. We are not limited by economics or different viewpoints.

With strategic and thoughtful leadership, the MDRT Foundation has taken strides to broaden our awareness and expand resources to all MDRT members. The MDRT Foundation's Worldwide and Quality of Life grant programs, endorsed by members and distributed to charities worldwide, have nearly doubled in size in recent years.

The MDRT Foundation was founded by members, is directed by members, and provides for members. We will always encourage your physical and financial involvement to make a difference and empower lives in the communities where you live and work.

I encourage you to become a "Johnny Appleseed" through the MDRT Foundation. Discover how using MDRT Foundation global grant programs makes an impact and creates a legacy of compassion in your community. By helping people, you will find your life changed as well. Engage with us today and make an impact for generations. Significance and kindness have no boundaries.

A handwritten signature in black ink that reads "Roger A. Seim".

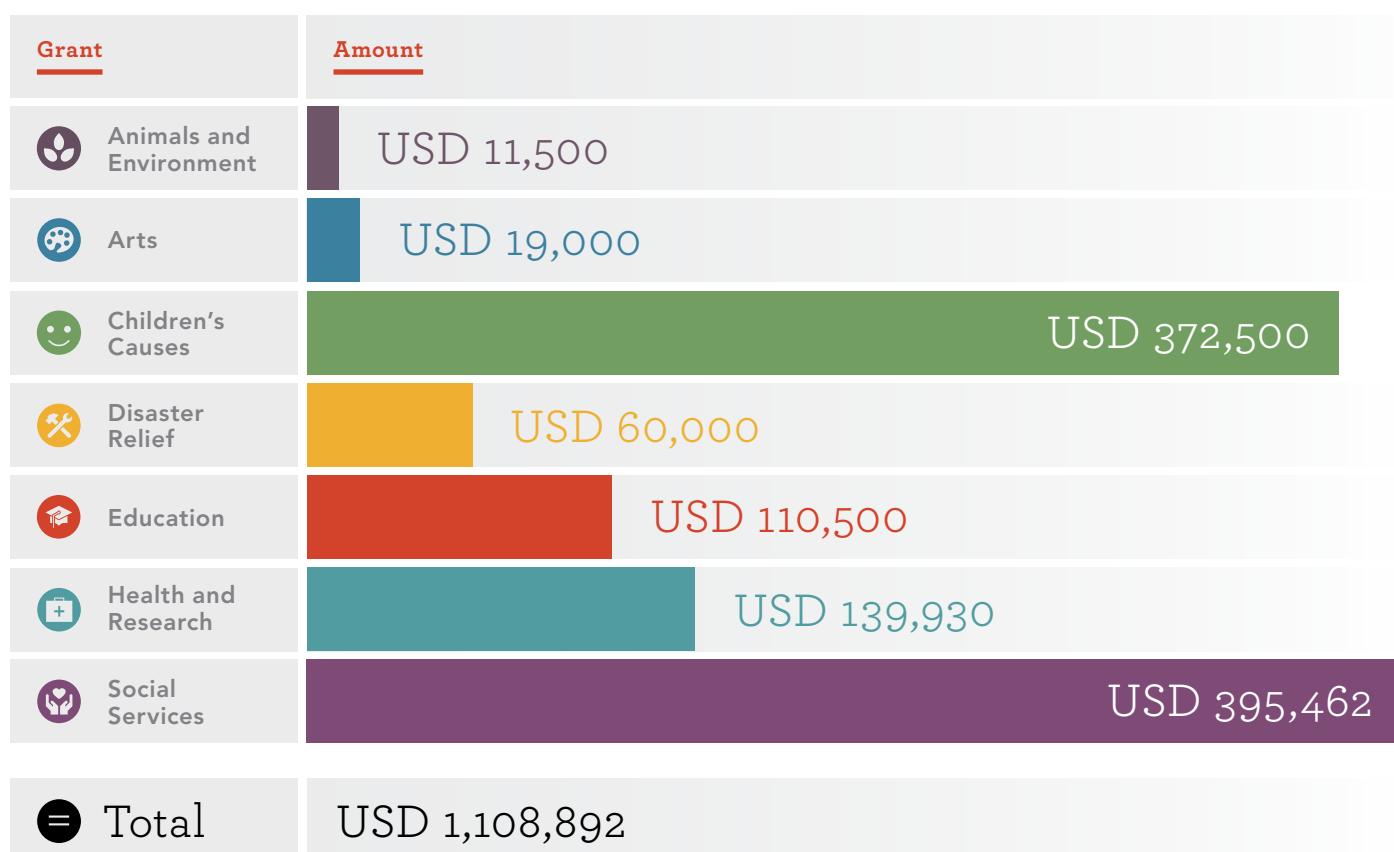
Roger A. Seim, MSFS, CLU
2015 MDRT Foundation President

Global Grant Programs

In 2014, the MDRT Foundation awarded 212 grants totaling USD 1,108,892 to support a diverse range of charities worldwide. The MDRT Foundation's grant programs comprise a number of different funds, all of which require the endorsement of a current MDRT member. Worldwide and Quality of Life grants require a grant application submitted by the charity and the member endorsing it. These are reviewed and awarded annually by a committee of MDRT members.

Additional grants programs are defined by Foundation policy and the Board of Trustees. These programs include grants to honor volunteer leaders from MDRT and the MDRT Foundation; charity partnerships in conjunction with MDRT meetings (Annual Meeting, Top of the Table Annual Meeting, MDRT Experience Meeting); disaster relief funding; and corporate citizen grants in support of charities in the community of MDRT's international headquarters in Illinois, USA.

For a complete list of 2014 Grant Recipients, please visit www.mdrtfoundation.org



How Change Happens

HOW MEMBERS' DONATIONS AFFECT PEOPLE THROUGHOUT THE WORLD



“The MDRT Foundation grants program reflects the values we stand for. Whether it's feeding the homeless in Chicago, caring for orphans in Texas, or providing boats to fisherman after the typhoon in the Philippines, we recognize that to whom much is given, much is expected. MDRT members worldwide represent what is good about our industry and lead by example through our grant-gifting.”

Kirk Wilkerson, 12-year MDRT member and 2014 Grants Committee Chair

Quality of Life Grant Awards

The MDRT Foundation's Quality of Life program was created to recognize members who embody MDRT's Whole Person concept of service by volunteering countless hours for a charitable organization in their community. In 2014, 26 members were honored, and the MDRT Foundation awarded USD 130,000 to charities in the name of these member volunteers. The MDRT Foundation awarded grants to the designated charity in increments of up to USD 3,500 (20 grants awarded), USD 5,000 (three grants awarded), USD 10,000 (two grants awarded) and one top award of USD 25,000.

USD 25,000 awardee

Alan Goldenberg, CLU, ChFC,
Walnut Creek, Calif., USA
Big Brothers Big Sisters of the Bay Area

USD 10,000 awardees

Alessandro M. Forte, Dip PFS,
London, England, United Kingdom
Royal Academy of Dramatic Art

E. Dennis Zahrbock, CLU, CFP,
Rice Lake, Wis., USA
Boys and Girls Club of Barron County

USD 5,000 awardees

Owen H. Ackerman, CLU, ChFC,
Peoria, Ill., USA
Salvation Army – Heartland Division

Allen R. Bruce, CLU, ChFC,
Silver Spring, Md., USA
Headley-Carter Cares Foundation

Bryon A. Holz, CLU, ChFC,
Brandon, Fla., USA
Epilepsy Services Foundation

USD 3,500 awardees

Mary Amen, LUTCF, CLU,
Huntington Beach, Calif., USA
Girls Incorporated of Orange County

Richard J. Campbell, CFP,
Morphett Vale, Australia
Southern Junction Community Services

Matt R. Carothers, CFP, CLU,
Columbus, Ind., USA
Bartholomew Consolidated School Corporation

Joanne Croteau, CLTC,
Lynn, Mass., USA
CLTC District 33N

Steven J. Elsberg, CLU,
Rockford, Ill., USA
Junior Golf Association of Greater Rockford

Terry G. Fenwick, CLU, ChFC,
Louisville, Ky., USA
Cedar Lake Residences

Judy L. Gregory, LUTCF, ARPC,
Enid, Okla., USA
RSVP of Enid and North Central Oklahoma

Steven L. Hammer, CLU, ChFC,
St. Cloud, Minn., USA
CentraCare Health Foundation

Bob Kaye, CFS,
Sherman Oaks, Calif., USA
Youth for Human Rights International

M. Rutherford Mays III,
Lynchburg, Va., USA
New Vistas School

Thomas L. McLeary, CLU,
Chicago, Ill., USA
Truestar

Robert Z. Nelson,
Memphis, Tenn., USA
First Responders Critical Support Foundation

Terence P. O'Halloran, FCII, CFP,
Lincoln, England, United Kingdom
Nomad Trust

Todd S. Purich,
Raleigh, N.C., USA
Comfort Zone Camp

George E. Ridings, CLU, ChFC,
Richmond, Ky., USA
Hospice Care Plus, Inc.

Merlin P. Santjer, CLU, RHU,
Dubuque, Iowa, USA
Mercy Service Club Autism Center

Thomas A. Schmidt, CFBS, CLTC,
Oklahoma City, Okla., USA
Goodland Presbyterian Children's Home

Bobette G. Scribner, CLU, ChFC,
Bradford, Vt., USA
Bradford Community Development Corporation

Benjamin Yin, MBA,
Peachtree Corners, Ga., USA
Kate's Club

Samuel M. Ziegel,
Westbury, N.Y., USA
OHEL Children's Home & Family Services

VOLUNTEERING



Has No Boundaries

VOLUNTEER COMMUNITY SERVICE PROJECT

Soles4Soles Service Project

New Jersey, United States



project in New Jersey, USA. Twenty-one MDRT members and friends participated in a shoe distribution, read story books to elementary school children and provided career advice for young adults in transitional housing.

"Working side by side with the MDRT Foundation was a fantastic experience. MDRT members are truly dedicated and passionate about helping others succeed."

Buddy Teaster, CEO of Soles4Souls

The MDRT Foundation partners with charitable organizations around the globe to engage MDRT members in volunteer service projects. In the past, MDRT members have built homes and playgrounds and distributed shoes for children and adults in underserved communities worldwide. **If you are interested in volunteering for a future MDRT Foundation service project, email foundation@mdrt.org.**

Camp Huronda Service Project

Huntsville, Ontario, Canada

On May 1–2, 2014, the MDRT Foundation partnered with Soles4Souls — an international shoe distribution charity — for a volunteer community service

located in Huntsville, Ontario, Canada. Camp Huronda serves children throughout Canada. Campers participate in activities that inspire personal growth and foster the appreciation of the outdoors such as swimming, hiking, canoeing, kayaking and team sports.



Excalibur Society

The Excalibur Society comprises the highest-level donors to the MDRT Foundation: Excalibur Knights. Membership in this elite group is reserved for individuals with lifetime contributions of USD 50,000 or more. Once a donor reaches Excalibur Knight, they can achieve the Legion of Honor or Royal Order Excalibur Knight levels with the value of deferred gifts such as life insurance.

Royal Order Excalibur Knight (USD 250,000 and above)



Joyce Baker
Brown #



Maria Ferrante-
Schepis, CLU #



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 #



Brian G.
Tarpey #

Legion of Honor Excalibur Knight (USD 100,000 to USD 249,999)



Robelyn H.
Abadie,
RFC, CAP + #



Eleanor W.
Allen, CLU *



John W. Allen,
CLU, ChFC *



Eph Baker,
CLU, ChFC *



Guy E. Baker,
MSFS, CLU, ChFC +



Jennifer A.
Borislow, CLU



D. Scott
Brennan + #



Allen R. Bruce,
CLU, ChFC #



Robert Hintze
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 #



Robert D.
Hall #



Allan G.
Hancock,
CLU, ChFC #



Brian D.
Heckert,
CLU, ChFC #



Michelle L.
Hoesly,
CLU, ChFC #



Mark S. Jones
+



Joseph W.
Jordan



Brent R.
Kimball,
CFP, ChFC #



Patricia L.
Krarup,
MSFS, ChFC
+ #



Donald M.
Lawson,
CLU, LUTCF #



John Marshall
Lee,
CLU, RHU + #



Charles D.
Marks,
CLU, ChFC #



Mitchell Wm.
Ostrove,
CLU, ChFC + #



A. Duer
Pierce Jr.,
CLU, ChFC #



Walton W.
Rogers,
CLU, ChFC + #



Stephen O.
Rothschild,
CLU, ChFC +



Robert C.
Savage,
CLU, ChFC #



Thomas C.
Sellin,
CLU, ChFC #



Jerry D.
Semler, CLU



William M.
Upson,
ChFC, CLU #

Excalibur Knight (USD 50,000 to USD 99,999)

								
Stephen D. Andersen, RHU	Donald J. Benedetti	Jack E. Bobo, CLU, FLMI #	Terrell L. Calhoun	John B. Carter, CLU *	Adelia C. Chung, CLU, ChFC #	John W. Cruikshank III, CLU #	Kamal N. Daya, CLU, ChFC	Ronald M. De Baets, CLU * #
William H. Dodd, CLU +	Alessandro M. Forte, Dip PFS	Roderick L. Geer, CLU	Tony Gordon	Gilbert A. Haggart, CLU, LUTCF	Philip E. Harriman, CLU, ChFC +	Solomon Hicks	David H. Hilton, CLU, ChFC *	Barry A. Kaye, CLU
Herbert D. Landon *	Robert V. Maloney, CLU, CFP	William E. McMann	Marshall Miller II, CLU, ChFC	Sally W. Munford, CLU, MSFS #	Jaydev R. Patel	George B. Pickett, JD, CLU +	John J. Prast, CAE, LLIF #	Jim E. Rogers, CLU, CFP +
Marilyn H. Rose #	Lawrence J. Rybka, JD, CFP	Jerry Rydell, CLU, ChFC						
Aurora Saenz	Walter G. Schnee III + #	Marc A. Silverman, CLU, ChFC						
Allen A. Skogbo, CLU, ChFC #	Richard H. Sullenger +	Jack B. Turner, CLU, ChFC #						
Donald F. White Jr., CLU, ChFC								

“I am a citizen
of the world,
and my nationality
is goodwill.”

Socrates

2014 Inner Circle Society

Inner Circle Society members have supported the MDRT Foundation with annual gifts totaling more than USD 5,000. To accommodate recognition opportunities at the 2014 MDRT Annual Meeting, recognition dates for the 2014 Inner Circle Society were April 1, 2013, to March 31, 2014.

Benefactor (USD 25,000)



Eph Baker, CLU,
ChFC *



D. Scott
Brennan



Joyce Baker
Brown



Richard L. Haas

Founder (USD 10,000)



Jennifer A.
Borislow, CLU



Mark J. Hanna,
CLU, ChFC



Brian D. Heckert,
CLU, ChFC



Solomon Hicks



Brent R. Kimball,
CFP, ChFC



Gregory Alan
McRoberts,
CFP, CLU



Marc A.
Silverman,
CLU, ChFC

Patron (USD 5,000)

Stephen D. Andersen, RHU
Adrian P. Baker, Dip PFS
Donald J. Benedetti
R. Steve Briggs, CLU, ChFC
Robert Hintze Colyar, CLU, ChFC
H. Richard Dobson Jr., CFP
James V. Durkin, CFP, CLU
Bruce W. Etherington, CLU, ChFC
Marvin H. Feldman, CLU, ChFC
Alessandro M. Forte, Dip PFS
H. Larry Fortenberry, CLU, ChFC
Gregory B. Gagne, ChFC
Robert N. Garneau, CLU, ChFC
Rao K. Garuda, CLU, ChFC
Tony Gordon
Gilbert A. Haggart, CLU, LUTCF
Steven L. Hammer, CLU, ChFC
Michelle L. Hoesly, CLU, ChFC
James A. Jacobs, CLU, ChFC
Joseph W. Jordan
Lawrence F. Kolasa, CLU, ChFC
Lance B. Kolbet, RHU, LUTCF

Donald M. Lawson, CLU, LUTCF
John Marshall Lee, CLU, RHU
Edward E. Leisher, CLU
Andrew C. Lord, CLU, ChFC
Peter R. Magni, LUTCF
JoAnn M. Martin, CPA, FLMI
Thomas R. McCoy
Paul S. McCready, RFC, CFP
Charles E. McDaniels, CLU, ChFC
David S. McKechnie, CLU
William E. McMann
Michael J. McNeil, CLU, ChFC
Marshall Miller II, CLU, ChFC
Dayton H. Molendorp, CLU
Sally W. Munford, CLU, MSFS
George Nabeshima, CFP, CLU
John F. Nichols, MSM, CLU
Mitchell Wm. Ostrove, CLU, ChFC
A. Duer Pierce Jr., CLU, ChFC
Barbara A. Pietrangelo, CFP, ChFC
R. Jan Pinney, CLU, CPCU
Robert V. Price Jr., MSFS, ChFC
Derek J. Reed, CFP, CLU
Theodore S. Rusinoff, CFP

Lawrence J. Rybka, J.D., CFP
Jerry Rydell, CLU, ChFC
Aurora Saenz
Arthur R. Salomon
Robert C. Savage, CLU, ChFC
Randy L. Scriffield, CFP, LUTCF
Roger A. Seim, MSFS, CLU
Thomas C. Sellin, CLU, ChFC
Jerry D. Semler, CLU
John A. Shumski, RFC, LUTCF
James J. Silbernagel, LUTCF, CFP
Ram S. Tak
Brian G. Tarpey
Edwin W. Thauer Jr., CLU, ChFC
William M. Upson, ChFC, CLU
Steven Valerius, FLMI
Ross Vanderwolf, CFP
Robert W. Waddell
Brian P. Walsh, CLU, ChFC
Robert Wasky, CLU
David S. Weiss, CLU, ChFC
Donald F. White Jr., CLU, ChFC
Stephen Mark Woodhall

MDRT Foundation Legacy Fund



Joyce Baker
Brown



Mark J. Hanna,
CLU, ChFC

The Legacy Fund is a major donor opportunity that allows you to fund and identify annual grants made by the MDRT Foundation. Individuals can join the Legacy Fund with an initial contribution of USD 100,000 or a paid-up life policy of at least USD 500,000 to fund annual Legacy grants (minimum USD 10,000) made in their name.

Bridging the gap between a donor-advised fund and unrestricted charitable giving, the Legacy Fund program allows donors to support the MDRT Foundation grant program in a significant way while also providing guidance and funding to the grant-making process on an annual basis.

“We do not see any borders from space.

We just see a unique planet with a thin, fragile atmosphere. From up here it is crystal clear that on Earth we are one humanity.”

Alexander Gerst, Astronaut, NASA

Corporate Sponsors

Corporate Excalibur Society

The Corporate Excalibur Society comprises companies that have generously donated USD 250,000 or more in lifetime support to the MDRT Foundation.

Royal Order (USD 1,000,000)

MDRT

Prudential

Legion of Honor (USD 500,000)

American National

Farm Family

OneAmerica

Excalibur Knight (USD 250,000)

Ameritas

AXA Equitable

John Hancock Financial Network

MassMutual Financial Group

New York Life

Voya Financial

2014 Corporate Sponsors

The MDRT Foundation is grateful for the generosity of our annual corporate supporters in the financial services industry. Their sponsorship illustrates a commitment to corporate social responsibility and a passion for supporting charitable causes important to MDRT members around the globe.

Gold (USD 50,000)

MassMutual Financial Group

Ohio National Financial Services

OneAmerica

Prudential

Silver (USD 25,000)

Allianz

Ameritas

Lincoln Financial Group

Principal Financial Group

State Farm Insurance

“Give to the world
the best you have,
and the best will
come back to you.”

Madeline Bridges

Matching Gift Companies

The following companies support the charitable efforts of their agents by matching individual gifts made to the MDRT Foundation. We thank them for allowing us to promote their involvement. Please contact your home office to see if you can double the impact of your donations to the MDRT Foundation.

Ameritas

AXA Equitable

Beneficial Life

John Hancock Financial Network

MassMutual Financial Group

Principal Financial Group

The Prudential Foundation

Thrivent Financial for Lutherans

Transamerica

ValMark Securities

Voya Foundation

Gift of Life Insurance Program

The Gift of Life Insurance program recognizes donors who have made a long-term commitment to the MDRT Foundation through the gift of life insurance. Through modest donations of a life insurance premium, these special donors help fund the MDRT Foundation endowment. The generosity of Gift of Life Insurance donors ensures the future of the Foundation's grant programs. The dollar amounts listed are based on the benefit amount designated to the MDRT Foundation.

USD 500,000 and above

Richard L. Haas
Mark J. Hanna, CLU, ChFC

USD 250,000 to USD 499,999

Maria Ferrante-Schepis, CLU
John F. Nichols, MSM, CLU
Douglas R. Peete, ChFC
Barbara A. Pietrangelo, CFP, ChFC

USD 100,000 to USD 249,999

Robelyn H. Abadie, RFC, CAP
Robert L. and Dorcas Avery II, CLU, ChFC
Allen R. Bruce, CLU, ChFC
Mario A. Canta
Charles Garrity, CLU, ChFC
Robert S. Israel, CLU
R. J. Kelly, ChFC, MSFS
Lance B. Kolbet, RHU, LUTCF
Gene L. Mahn, CLU, ChFC
Charles D. Marks, CLU, ChFC
Michael J. McNeil, CLU, ChFC
A. Duer Pierce Jr., CLU, ChFC
Ann Baker Ronn, LUTCF
Brett M. Sause, LUTCF, RFC
Roger A. Seim, MSFS, CLU
Brian G. Tarpey

USD 50,000 to USD 99,999

Barbara B. Balser, CLU, ChFC
Ron D. Barbaro
Donald E. Baxter, CFP
Sally Biever-Ward, CLU
Lyle L. Blessman
John H. Bowen III
Frederick L. Brown, CLU, ChFC
Joyce Baker Brown
James M. Chapman, CFP
David J. Downey, CLU
James V. Durkin, CFP, CLU
Don A. Eichelberger, CLU, ChFC
Marvin H. Feldman, CLU, ChFC
H. Larry Fortenberry, CLU, ChFC
Douglas K. Freeman
Willie J. Goldwasser, CLU, ChFC
Victor H. Groth, CLU, ChFC
Robert D. Hall
Allan G. Hancock, CLU, ChFC
G. Carey Hauenstein, CLU
Brian D. Heckert, CLU, ChFC
Michelle L. Hoesly, CLU, ChFC
John H. Jacobs, CLU
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Brent R. Kimball, CFP, ChFC
Patricia L. Krarup, MSFS, ChFC
Bruce & Kathleen Langford Family
Foundation
John Marshall Lee, CLU, RHU
Lopas Family Foundation
David S. McKechnie, CLU
Burton A. Meldman, CLU, ChFC
Alan Meltzer
Neal K. Miller
Moskow Family Foundation
David O. Nelson
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Mitchell Wm. Ostrove, CLU, ChFC
Frank A. Passarelli, CLU, ChFC
Seymour Petrovsky, CLU
W. Luther Pierce IV, CLU
Arlen I. Prentice, CLU, ChFC
Derek J. Reed, CFP, CLU
John F. Rippinger, CLU, ChFC

The Linda Ritter Fund
Sanford H. Robbins, CLU
Ketha R. Robbins, CLU, ChFC
Ken & Beth Rusinoff Family Foundation
Suzanne Wuepper Sanford
Robert C. Savage, CLU, ChFC
Thomas C. Sellin, CLU, ChFC
James J. Silbernagel, LUTCF, CFP
Rick Thomas, CLU
Stephanie A. Walsh, CLU, ChFC
Tom Wamberg, CLU
Gerald R. Whitenack, CLU
E. Dennis Zahrbock, CLU, CFP

USD 25,000 to USD 49,999

Owen H. Ackerman, CLU, ChFC
Larry J. Baker, CLU, ChFC
Ronald D. Balser, CLU
Ronald E. Bishop
Bradley Bofford, CFP, ChFC
D. Scott Brennan
Michael O. Brown, LUTCF
Lee B. Canfield, CLU, ChFC
Martin E. Chandler
Adelia C. Chung, CLU, ChFC
Richard E. Craft, CLU, ChFC
George Creznic Jr., CLU, ChFC
Lynne S. Crow, CLU, ChFC
John W. Cruikshank III, CLU
John H. Curry, CLU, MSFS
Jeffrey Allan Dawson, CLU, ChFC
John D. De Maria, CLU, ChFC
Cyrus J. Denmark
Edgar Enciso, CLU
Frederick N. Fanning, CLU
Scott Foster, CLU
Samuel David Friedman
Charles C. Gleason, CLU, MSFS
W. Scott Gons, CPA, ChFC
Tony Gordon
Richard E. Graham, CFP
Millard J. Grauer, CLU, ChFC
William E. Griffith, CLU, ChFC
Joan Halstead, CLU, ChFC
C. Richard Herrold, CLU, CFP
David A. Hjorth, CLU, ChFC

Bequests and Charitable Trusts

Robert B. Holland, CLU, ChFC
Roger A. Hubley, CLU, ChFC
Douglas W. Johnson, CLU, MSFS
Kevin C. Kingston, CLU, ChFC
Lawrence F. Kolasa, CLU, ChFC
Herb Kristal, CLU
David F. Lau, CLU, ChFC
Donald M. Lawson, CLU, LUTCF
Caryl T. Lenahan
Keith L. Lion, CLTC
William F. Lyon, CFP, MSFS
William A. Magnusson, CLU, CFP
Frank A. Marcin, CLU, MSFS
JoAnn M. Martin, CPA, FLMI
Frank D. McArthur II, CLU, ChFC
Barry McBride, CLU, AEP
Allan T. Mendels, CLU, ChFC
John R. Milam, CLU
Daniel P. Mulheran, CLU, ChFC
Sally W. Munford, CLU, MSFS
James F. O'Connell, CLU
Barton C. Pasco, CLU, ChFC
P. Martin Peters, CLU, RHU
Leo V. Petrini, CLU, ChFC
Harry Phillips III, CLU, CPCU
James Douglas Pittman, CLU, CFP
Robert B. Plybon, CLU, ChFC
William F. Pollak III, CLU, ChFC
Wilmer S. Poynor III, CLU, ChFC
John J. Prast, CAE, LLIF
Lawrence A. Reister, CLU, ChFC
Walton W. Rogers, CLU, ChFC
Neelam Salmen, CLU, ChFC
Richard W. Sawyer, CLU, ChFC
Walter G. Schnee III
Joseph R. Schofield, CLU
Allen A. Skogebø, CLU, ChFC
N. W. Solomon, CLU
W. Thomas Spencer Jr., CLU, ChFC
S.C. Stanford, CLU
David R. Stuart
Peter A. Sullivan, CLU
Mary Lou Taylor, CLU, ChFC
Thomas N. Tessier
Barbara Treadwell, CLU, ChFC
Jack B. Turner, CLU, ChFC
Tim Van Der Weide, CLU, ChFC
Thomas H. Waring Jr., CLU, ChFC
Susan Sikes Wills, JD, CLU

You can leave a legacy of compassion for people in need by naming the MDRT Foundation as a beneficiary of your estate. The following individuals have named the MDRT Foundation as a beneficiary in their will or charitable trust.

Walter G. Barnes, CLU, ChFC
Jack E. Bobo, CLU, FLMI
Tom B. Brown, CLU, ChFC
Millard J. Grauer, CLU, ChFC
Roger A. Herrmann, CLU
R.J. Kelly, ChFC, MSFS
William G. Loventhal III, CLU, CFP
Sally W. Munford, CLU, MSFS
Marilyn H. Rose
Jack Stone, BAHonsEco, Cert PFS
Brian P. Walsh, CLU, ChFC

For more information about how to include such a gift in your estate planning, please visit www.mdrtfoundation.org.





MDRT FOUNDATION CANADA

MDRT Foundation Canada had an exciting year that included a successful Phonathon, its first-ever Valentine's Day online auction and several different initiatives that engaged MDRT members.

MDRT Foundation Canada awarded CAD 70,000 (USD 60,100) in grants to 14 member-endorsed charities. Gifts of hope are changing lives throughout Canada.



MDRT FOUNDATION JAPAN



In 2014, MDRT Foundation Japan awarded JPY 6.4M (USD 64,000) in grants to 27 charitable organizations in Japan. Grants included funding for Child Chemo House to provide housing for families of pediatric cancer patients while the child receives chemotherapy.

In August 2014, torrential rain caused a landslide in Hiroshima City, Japan, killing 74 residents and damaging 4,500 houses. MDRT Foundation Japan donated JPY 500,000 (USD 5,000) for disaster relief efforts for this community through the Japanese Red Cross.

MDRT Foundation Japan had its biggest fundraising effort through the combination of the local MDRT chapter Annual Meeting in April and 14 regional seminar workshops in the fall. As of December 2014, almost JPY 9M (USD 90,000) was raised to support MDRT Foundation Japan's charitable programs.

FREEDOM



M

Has No Boundaries

MDRT FOUNDATION GRANT

Lutheran Mideast Development

Van, Turkey

Many women living in Van, Turkey face severe isolation and economic empowerment challenges.

Lutheran Mideast Development is a nonprofit organization based in St. Paul, Minnesota, USA, committed to helping women in the Middle East through income-generating and training programs.

The MDRT Foundation's grant supported the Van Kurdistan Young Women's Business Initiative, an outreach program that provides textile and weaving training to women in Van. This program promotes independence and provides a valuable source of income for women in this region.

This USD 3,500 grant was endorsed by 35-year MDRT member and MDRT Foundation Diamond Knight **Jerry Maier, CLU, CHFC**, from Lake Elmo, Minnesota, USA.



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“We must realize each
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difference with our life.
Each of us impacts the
world around us every
single day.”

Dr. Jane Goodall

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Programs Assistant
allegretti@mdrt.org

Caryn Henning
Fund Development Associate
chenning@mdrt.org

Ava Newbart
Fund Development Manager
anewbart@mdrt.org

Fiona Odumosu
Communications & Recognition Supervisor
fodumosu@mdrt.org

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The MDRT Foundation is sincerely thankful for the generosity of our donors. Because of your support, we can empower children, families and adults in need. Knights are our most loyal supporters who have given USD 2,000 or more in lifetime contributions. 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. The donors listed here are MDRT Foundation Knights who have made annual gifts between January 1 and December 31, 2014.

To see a complete list of 2014 donors, please visit www.mdrtfoundation.org

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(Based on Cumulative Lifetime Gifts):

Royal Order Excalibur Knight	USD 250,000
Legion of Honor Excalibur Knight	USD 100,000
Excalibur Knight	USD 50,000
Platinum Knight	USD 25,000
Diamond Knight	USD 10,000
Gold Knight	USD 5,000
Silver Knight	USD 3,000
Bronze Knight	USD 2,000

Annual Recognition

◦ Inner Circle Society	USD 5,000 or more in 2014
» Annual Leader	USD 2,500 – 4,999 in 2014
△ Annual Sustainer	USD 1,000 – 2,499 in 2014

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Oklahoma, United States

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The MDRT Foundation awarded a USD 3,500 Quality of Life grant to Goodland Academy in honor

of the volunteerism of five-year MDRT member **Thomas A. Schmidt, CFBS, CLTC**, from Oklahoma City, Oklahoma, USA. Schmidt has volunteered for this organization for 10 years, helping to raise awareness and funds for the educational and social development needs of Goodland Academy students.



"Thanks to all of the volunteers, I now know what it is like to have a real family who loves and cares about you. Goodland Academy has been one of the greatest things that ever happened in my life."

Jeff, current Goodland Academy student

Fiscal Year 2014 Financial Summary

Revenue

Contributions	USD 1,542,175
In-Kind Contributions	1,011,497
Portfolio Gain/(Loss)	3,132,291
Increase in Cash Surrender Value	166,440
Other Income	196,837
Total Income	6,049,240

Expenses

Program Grants	1,108,892
Fundraising	196,195
Management and General	411,073
In-Kind Support from MDRT	959,352
Total Expenses	2,675,512

Increase in Unrestricted Net Assets	3,373,728
Unrestricted Net Assets Beginning of Year	23,422,029
Unrestricted Net Assets End of Year	USD 26,795,757

Giving Has No Boundaries

When you make a donation to or volunteer for the MDRT Foundation, you join a global network of MDRT members committed to making the world a better place.

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The mission of the Million Dollar Round Table Foundation is to increase member and industry participation and to give funds to worthwhile charitable organizations throughout the world.

