



# We are all Connected



MDRT  
FOUNDATION  
2016 ANNUAL  
REPORT

# Connections



The MDRT Foundation awards funding to charities that are connected to MDRT members. These vital relationships allowed the MDRT Foundation

to connect with hundreds of charities worldwide this past year, awarding more than USD 1.26 million in grant checks.

MDRT Foundation service projects provide opportunities for members to give back to host cities while attending an MDRT meeting. Whether building a playground, assembling backpacks or painting a crisis shelter, MDRT members are always eager to connect with fellow members, volunteers and community organizations to help those most in need.

My Foundation connection started in 1995 when I volunteered for my first of 25 MDRT Foundation Phonathons. These are phone calling marathons (no running required!) consisting of two days and nearly 300 phone calls to fellow members, giving them the opportunity to support and participate in our unique, member-driven, charitable Foundation.

Opportunities to connect with other members also exist in Foundation committees, where member leaders and MDRT's professional staff help shape the future of our Foundation.

The MDRT Foundation provides members with an opportunity to connect with their communities and those most in need, making a positive impact that extends far beyond our individual efforts. Thank you for helping us connect in 2016.

**H. Richard Dobson Jr., CFP**  
MDRT Foundation President



## USD 50,000 awardee

**James T. Bardin, CLU, ChFC**  
Tampa, Fla.  
THE CHILDREN'S HOME, INC.

## Spotlight on Jim Bardin and The Children's Home

During the 2016 MDRT Annual Meeting, the MDRT Foundation presented 37-year MDRT member **James T. Bardin, CLU, ChFC**, of Tampa, Florida, with the top Quality of Life Award for his outstanding volunteerism with The Children's Home. For the past 21 years, Bardin has volunteered to raise awareness for the organization, which provides care for struggling families and a safe haven for children who have suffered abuse, neglect or abandonment. The MDRT Foundation awarded a USD 50,000 grant to The Children's Home in Bardin's name. This grant funds the CARES Initiative, an educational program that provides hands-on tutoring and mentoring for children who live in their residential facility. "Thousands of children have become productive, well-rounded adults thanks to Bardin's commitment and passion for helping The Children's Home," said Bob Krouse, director of development for The Children's Home.

## Honoring Members' Volunteerism: Quality of Life Grant Awards

The MDRT Foundation's Quality of Life grants program recognizes members who volunteer for a charitable organization they are passionate about. These grants honor our members' significant connections to community and their investment in helping those less fortunate.

### USD 5,000 awardees

**Michael A. Aun II, FIC, LUTCF** / St. Cloud, Fla.  
CATHOLIC CHARITIES OF CENTRAL FLORIDA, INC.

**Amy J. Braun-Bostich, CFP, CFS**  
McMurray, Pa. / GREATER WASHINGTON COUNTY FOOD BANK

**Karen B. Channell** / Alexander City, Ala.  
AU WOMEN'S LEADERSHIP INSTITUTE

**Steve Church, CLU, ChFC** / Nashville, Tenn.  
TENNESSEE PRISON OUTREACH MINISTRY

**Kathryn I. Duclo-Amerine, LUTCF**  
Manteca, Calif. / HOSPICE OF SAN JOAQUIN

**David M. Ethell, LUTCF** / Camarillo, Calif.  
DREAM CENTER FOUNDATION

**Jim S. Forbis, CLU, ChFC** / Memphis, Tenn.  
COMPANY D DANCERS

**Annette Hammortree** / Crystal Lake, Ill.  
PACT, INC.

**Concepcion S. Hernandez** / Edinburg, Texas  
RONALD MCDONALD HOUSE CHARITIES

**James W. Hessenthaler, CLU, ChFC**  
Gurnee, Ill. / HOPE RENEWED INTERNATIONAL

**Stephen Kagawa, FSS, LUTCF**  
Monrovia, Calif. / GO FOR BROKE NATIONAL EDUCATION CENTER

**Yukiko Kuniyoshi** / Tokyo, Japan  
JAPAN SERVICE DOG ASSOCIATION

**Gregory C. Mottau, CLU, ChFC**  
Portland, Ore. / EDUCONGO, INC.

**Jeffrey M. Owens, AIF** / Clackamas, Ore.  
CHILDREN'S CANCER ASSOCIATION

**James E. Prickett, CLU, ChFC**  
Atlanta, Ga. / MARINE CORPS COORDINATING COUNCIL OF GEORGIA, INC.

**Richard L. Rawlings, CLU, ChFC**  
Manchester, N.H. / EASTER SEALS - NEW HAMPSHIRE, INC.

**John A. Shumski, RFC, LUTCF**  
Lansdale, Pa. / MONTGOMERY COUNTY DOWN SYNDROME GROUP

**Marc L. Strent, CFP, CLU** / Woodbury, N.Y.  
CHABAD LUBAVITCH CHAI CENTER, INC.

**Timothy W. Thomas** / Metairie, La.  
BOYS TOWN LOUISIANA, INC.

**Wayne E. Thomas, CLU** / Metairie, La.  
DISCOVERY HEALTH SCIENCES FOUNDATION, INC.

**Albert J. Travasos, CLU, CLTC**  
Boca Raton, Fla. / GEORGE SNOW SCHOLARSHIP FUND

**Susan S. Wills, J.D., CLU** / San Angelo, Texas  
LA ESPERANZA CLINIC

### USD 25,000 awardees

**Charles Garrity, CLU, ChFC**  
Naples, Fla.

INTERNATIONAL VILLAGE CLINIC

**Steven D. Goodwin**  
Williamsville, N.Y.

DISABLED SPORTS USA

### USD 10,000 awardees

**Joseph G. Gootter, CLU, ChFC**  
Tucson, Ariz.

STEVEN M. GOOTTER FOUNDATION

**Ronald F. Mayer, CLU, ChFC**  
Worthington, Ohio

DIRECTIONS FOR YOUTH AND FAMILIES

**Brian R. Phares**  
North Platte, Neb.

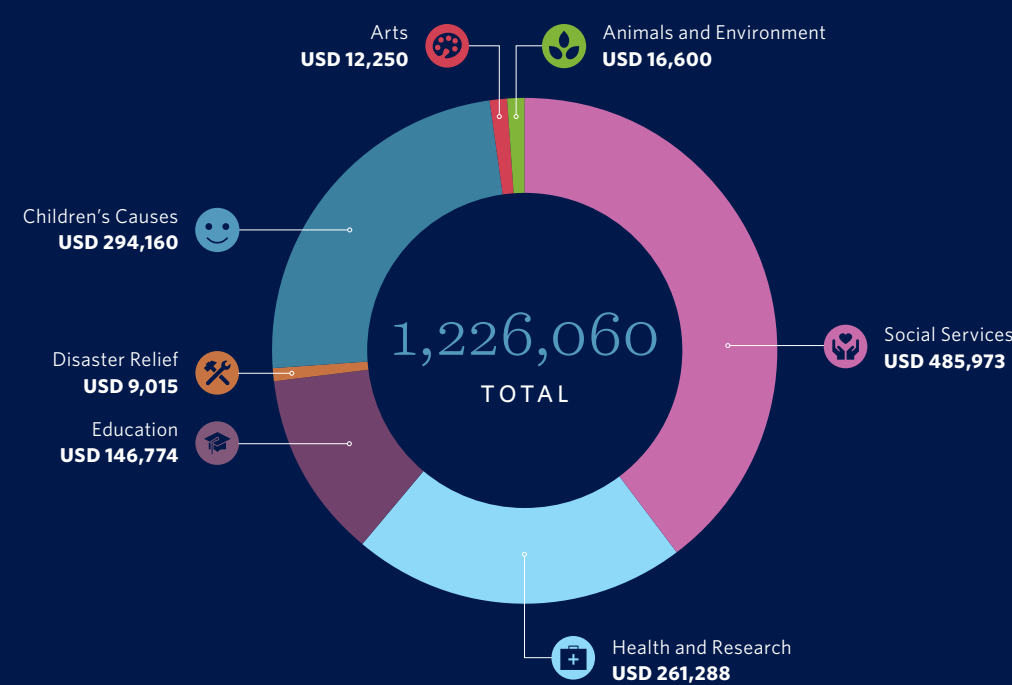
CONNECTION HOMELESS SHELTER, INC.



# Connecting MDRT Foundation Grants with Communities in Need

In 2016, the MDRT Foundation awarded 216 grants totaling USD 1,226,060 to fund charitable programs around the world — 32 countries, in fact. Each of these grants required the endorsement of a current MDRT member. Which means the caring and sharing spirit of our MDRT members — and the financial services industry as a whole — ran strong throughout our diverse global community.

For a complete list of 2016 grant recipients, visit [mdrtfoundation.org](http://mdrtfoundation.org).



## Ride 2 Recovery

USA / GRANT SPOTLIGHT

Ride 2 Recovery uses cycling programs to rehabilitate veterans suffering from physical and mental injuries, including amputations, traumatic brain injuries and post-traumatic stress disorder. Since its founding in 2008, more than 20,000 injured U.S. military personnel and their families have been aided by the organization. **Lawrence F. Kolasa, CLU, ChFC**, a 39-year MDRT member and 1996 MDRT Foundation President of Birmingham, Michigan, endorsed a USD 25,000 MDRT Foundation Worldwide Grant to support Ride 2 Recovery's Project HERO (Healing Exercise Rehabilitation Opportunity) which provides training and support for community programs and Honor Ride in Columbus, Ohio.

## Canticum Novum Music Camp

UKRAINE AND ROMANIA / GRANT SPOTLIGHT

Canticum Novum Music Camp uses the power of music to bring joy and dignity to children with special needs in Ukraine and Romania. **Walter G. Schnee III**, a 48-year MDRT member and 1996 MDRT President from Bend, Oregon, endorsed an MDRT Worldwide Grant for USD 25,000 to fund three music camps for approximately 300 children. Each camp includes five days of choir and instrument instruction, culminating in a concert performance where the children are accompanied by professional musicians.

## NGO2 BambooShoot Foundation

CAMBODIA / GRANT SPOTLIGHT

NGO2 BambooShoot Foundation provides safe housing and a high school education for young Cambodian women from remote villages who would otherwise not have access to formal education. **John Anthony Goldsbrough**, a 42-year MDRT member from North Rocks, New South Wales, Australia, endorsed an MDRT Foundation Worldwide Grant for USD 2,000 to support the NGO2 Bamboo Shoot Foundation in their efforts to build a brighter future for these young women.

## Japan Service Dog Association

JAPAN / GRANT SPOTLIGHT

There are only 74 qualified service dogs in Japan, while there are 15,000 people in the country with physical disabilities who could live more independent lives by using a service dog. Training service dogs to meet the specific needs of the user requires substantial funds and highly skilled trainers. **Yukiko Kuniyoshi**, a 13-year MDRT member from Tokyo, Japan, was awarded an MDRT Foundation Quality of Life Grant of USD 5,000 for the Japan Service Dog Association in honor of her volunteerism. The grant will be used to train more service dogs and provide instruction to develop qualified dog trainers.



CANADA



USA



AFRICA



ROMANIA

UKRAINE



JAPAN



CAMBODIA



HONG KONG

# Connecting MDRT Meetings with a Mission

At each 2016 MDRT meeting, the MDRT Foundation invited attendees to support charitable organizations addressing health care and social service issues. MDRT members responded enthusiastically, resulting in a record number of donations and volunteer support for these campaigns.

## Covenant House

CANADA

In addition to monetary donations, Top of the Table members packed more than 500 personal care packages for youth at Covenant House during the Top of the Table Annual Meeting. Covenant House provides loving care and services to youth who are homeless, abused and trafficked.

## Mercy Ships

AFRICA

A record 1,500 donors supported the Promise Appeal campaign at the MDRT Annual Meeting benefiting Mercy Ships — a hospital ship that provides free lifesaving surgeries in places where medical care is nearly non-existent.

## Food Angel

HONG KONG

Volunteers from seven countries prepared 2,000 nutritious meals for the elderly at Food Angel's community center in Kowloon, Hong Kong. Food Angel received a USD 10,000 grant as the charity partner at the MDRT Experience and Global Conference.

## Connect a Charity with an MDRT Foundation Grant

How do you apply for an MDRT Foundation Grant to support a charity you are passionate about? It's easy.



### QUESTIONS?

Please contact the MDRT Foundation at [foundation@mdrt.org](mailto:foundation@mdrt.org) or +1(847) 692-6378 and we'll walk you through the process.

Annual deadline for grant applications:

September 1

## Financial Summary

September 1, 2015 – August 31, 2016

### Revenue and Support

|                        |               |
|------------------------|---------------|
| Contributions          | USD 1,807,625 |
| In-Kind Contributions  | 807,859       |
| Other Income           | 65,696        |
| Total Operating Income | 2,681,180     |

### Expenses

|                          |           |
|--------------------------|-----------|
| Program Grants           | 1,226,060 |
| Fundraising              | 170,021   |
| Management and General   | 366,638   |
| Direct Support from MDRT | 784,564   |
| Total Operating Expenses | 2,547,283 |

### Investment Activity

|                                  |           |
|----------------------------------|-----------|
| Investment Income                | 788,818   |
| Realized Portfolio Gains         | 92,917    |
| Unrealized Portfolio (Loss)      | 52,863    |
| Increase in Cash Surrender Value | 220,911   |
| Investment Advisor Fees          | (76,446)  |
| Total Investment Activity        | 1,079,063 |

### Temporarily Restricted Revenue

|  |        |
|--|--------|
| Contributions Service Projects / Promise Appeals | 55,174 |
|--|--------|

### Change in Net Assets

|                              |            |
|------------------------------|------------|
| Increase in Net Assets       | 1,268,134  |
| Net Assets Beginning of Year | 24,914,945 |
| Net Assets End of Year       | 26,183,079 |