A MESSAGE FROM THE EXECUTIVE DIRECTOR

Dear Friends of the Foundation:

As Executive Director of The Actuarial Foundation, I’ve had the privilege of working with many accomplished and exceptional leaders. Every leader was challenged beyond measure during 2020–2021, and I can’t quantify how grateful I am to Margaret Resce Milkint for her positive, graceful leadership as Chair of our Board of Trustees during this challenging time.

It was truly an honor to serve with Margaret who, as always, showed an amazing commitment to our mission. She often referred to herself as our “COVID Chair.” She approached every barrier as an opportunity and managed to find silver linings and showed courageous positivity throughout her tenure as Chair. I’ll never forget how Margaret always brought her smile to any meeting and event I was in; her enthusiasm was simply contagious and kept us spiritually afloat.

Under Margaret’s leadership as Chair, The Actuarial Foundation made herculean efforts to accomplish various feats, including but not limited to:

- Exceeding annual fundraising revenue goals during a global pandemic
- Establishing the Diversity, Equity & Inclusion and Risk Management Committees
- Transitioning all in-person Math Motivators tutoring programs to virtual tutoring environments in response to the global pandemic
- Partnering with multiple leaders and organizations to design a new Diversity Scholarship program through the STEM Stars Actuarial Scholars Program
- Implementing six virtual happy hours to keep donors, volunteers and partners engaged

On behalf of The Actuarial Foundation, I am so grateful to Margaret for all that we were able to accomplish in 2020–2021. I also am grateful to our individual and corporate supporters, our volunteers, our staff, and Board of Trustees for all that you make possible.

As you look through the pages of this Annual Report, I hope you’re proud of the work we’ve done to further our mission of enhancing math education and financial literacy through the talents and resources of actuaries.

Sincerely,

Jason Leppin, CFRE
Executive Director

Thank You, Volunteers!

The Foundation sends its highest appreciation to each and every person who gave of their time to support our mission and programs. We couldn’t do it without you!
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Supporting U.S. Actuarial Organizations
Since 2004, The Actuarial Foundation has received support from the U.S. actuarial organizations. Their trust and encouragement are key elements in the Foundation’s growth and continued success as the U.S. philanthropic organization for the actuarial profession.

Mission: To enhance math education and financial literacy through the talents and resources of actuaries.

Vision: An educated public in pursuit of a secure financial future.
WHAT YOU MADE POSSIBLE …

The Actuarial Foundation achieved the Platinum Seal of Transparency from Guidestar, the highest level of recognition offered, in October 2020. This recognition demonstrates the Foundation’s commitment to transparency and to giving donors and funders meaningful data to evaluate our performance.

In its second year, the Hardest Math Problem Student Contest garnered over 4,300 entries from middle school students across the country. Impressively, a fifth grader won the grand prize for the 8th grade question! Grand prize winners received a $5,000 deposit to a 529 savings plan and a laptop.

Hayden H. was the grand-prize winner for the 8th grade question.

In response to school closures and loss of learning due to the pandemic, Math Motivators moved quickly yet cautiously from in-person to virtual tutoring.

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The fourth year of the Modeling the Future Challenge successfully concluded with a virtual symposium in April. The Challenge broke a record for the number of schools (102) and teams (193) that registered and completed Phase One of the Challenge.

The Foundation celebrated Diversity Month with a Virtual Happy Hour. Guest speaker Dr. Leroy D. Nunery II shared some of his research about DEI in the insurance industry. Additionally, Foundation Trustees provided updates on how the Foundation is navigating DEI through its programs and resources.

iStock.com/Natalia Varlamova
## FUNDING OUR MISSION

### BALANCE SHEET

<table>
<thead>
<tr>
<th>Description</th>
<th>2021</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
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<tr>
<td>Cash and Cash Equivalents</td>
<td>$1,117,253</td>
<td>$1,175,147</td>
</tr>
<tr>
<td>Investments</td>
<td>$7,720,740</td>
<td>$6,023,412</td>
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<tr>
<td>Contributions Receivable</td>
<td>$1,370,561</td>
<td>$1,928,638</td>
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<td>Prepaid Expense</td>
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<td>$30,382</td>
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<tr>
<td>Property and Equipment,</td>
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<tr>
<td>Net of Accumulated Depreciation</td>
<td>$6,085</td>
<td>$6,085</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$10,250,816</strong></td>
<td><strong>$9,163,664</strong></td>
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<tr>
<td><strong>LIABILITIES AND NET ASSETS</strong></td>
<td></td>
<td></td>
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<tr>
<td><strong>Liabilities</strong></td>
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</tr>
<tr>
<td>Accounts Payable</td>
<td>$396,420</td>
<td>$566,875</td>
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<tr>
<td><strong>Net Assets</strong></td>
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<tr>
<td>Without Donor Restrictions:</td>
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<td></td>
</tr>
<tr>
<td>Available for Operation</td>
<td>$5,271,891</td>
<td>$3,166,743</td>
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<tr>
<td>Board-Designated</td>
<td>$1,134,854</td>
<td>$903,369</td>
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<tr>
<td><strong>Total Net Assets Without Donor Restrictions</strong></td>
<td><strong>$6,406,745</strong></td>
<td><strong>$4,070,112</strong></td>
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<tr>
<td>With Donor Restrictions</td>
<td>$3,447,651</td>
<td>$4,526,677</td>
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<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$9,854,396</strong></td>
<td><strong>$8,596,789</strong></td>
</tr>
<tr>
<td><strong>Total Liabilities and Net Assets</strong></td>
<td><strong>$10,250,816</strong></td>
<td><strong>$9,163,664</strong></td>
</tr>
</tbody>
</table>

### STATEMENT OF ACTIVITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>Year ended May 31, 2021</th>
<th>Seventeen months ended May 31, 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Without Donor Restrictions</td>
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<tr>
<td>Contributions:</td>
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<tr>
<td>Actuarial Organizations’ Support</td>
<td>$703,417</td>
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<tr>
<td>Annual Gifts</td>
<td>$755,634</td>
<td>$1,292,296</td>
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<tr>
<td>Other</td>
<td>$2,529,891</td>
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<tr>
<td><strong>Total Revenues</strong></td>
<td><strong>$3,988,942</strong></td>
<td><strong>$2,751,327</strong></td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td><strong>$3,988,942</strong></td>
<td><strong>$2,751,327</strong></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awards &amp; Prizes</td>
<td>$13,325</td>
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</tr>
<tr>
<td>Education</td>
<td>$1,473,791</td>
<td>$1,755,797</td>
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<tr>
<td>Scholarships</td>
<td>$364,211</td>
<td>$360,994</td>
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<tr>
<td><strong>Total Program Services</strong></td>
<td><strong>$1,851,327</strong></td>
<td><strong>$2,259,818</strong></td>
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<tr>
<td>Supporting Services:</td>
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<tr>
<td>Management &amp; General</td>
<td>$805,944</td>
<td>$1,114,448</td>
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<tr>
<td>Fundraising</td>
<td>$424,191</td>
<td>$631,410</td>
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<tr>
<td><strong>Total Supporting Services</strong></td>
<td><strong>$1,230,135</strong></td>
<td><strong>$1,745,858</strong></td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$3,081,462</strong></td>
<td><strong>$4,005,676</strong></td>
</tr>
<tr>
<td><strong>Change in Net Assets Before</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment Income</td>
<td>$907,480</td>
<td>$(1,237,595)</td>
</tr>
<tr>
<td>Investment Income (Net)</td>
<td>$1,429,153</td>
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<tr>
<td>Change in Net Assets</td>
<td>$2,336,633</td>
<td></td>
</tr>
<tr>
<td><strong>Net Assets – Beginning of Year</strong></td>
<td>$4,070,112</td>
<td>$4,526,677</td>
</tr>
<tr>
<td><strong>Net Assets – End of Year</strong></td>
<td><strong>$6,406,745</strong></td>
<td><strong>$8,596,789</strong></td>
</tr>
</tbody>
</table>
DEEPENING OUR IMPACT  
As of 5/31/21

2020–2021 Individual Donors and Family Foundations

We appreciate our individual and family foundation donors who share our commitment to strengthening math education and financial literacy.

**PIioneer - $50,000+**
Robert V. Deutsch  
Brian Duperreault  
Andy and Beth Rallis  
Rod and Lori Rohda  
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CONTINUED ON PAGE 7
ENSURING OUR SUCCESS

2020–2021 Math GEMs

Thank you to our recurring donors whose monthly or quarterly donations provide consistent support for our mission and work.

Christopher Donahue
Wendy Engel
William Esakov
Adam Feit

Toni French
Marlene Jones
Elton Kwan
James Lescoe
JoDee Lymburner
Damon Mehrl
Ryan Morris
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Xiao F. Wu
Chung-Ye Scott Yen
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Diane A. Zapisek
Melinda Zatto

CONTINUATION ON PAGE 9
The Actuarial Foundation 2020–2021 Annual Report

2020–2021 Foundation Donors

2020–21 LEGACY CIRCLE

Each of these donors has created a lasting legacy by making a bequest or estate gift to the Foundation. We are grateful for their generosity, both now and in the future.

Frank S. Derbak
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Christie Dietrich
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Jinzhu Jiang
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Avenash Kumar
Elton Kwan
Robert Laban
Jonathan Lai
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Inna Lapidus
Irene Lee
Andrew Lehewych
Walter A. Lehman
Da Lei
Francis P. Lemery
Daniel J. Lennington
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Patrick Lesage
Kenneth R. Levin
Gerald A. Levy
Amilea Z. Li
Tiffany Li
Karen Lindebrekke
Steven A. Link
Abigail Linsky
Lanlan Liu
Minda Liu
Yuanjin Liu
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