Dear Friends of the
Foundation for
Financial Service Professionals:

“Gratitude is happiness doubled by wonder.” This quote from English writer and philosopher G.K. Chesterton was cited by ethicist Ron Duska, PhD, in the Journal of Financial Service Professionals. Dr. Duska also stated that the “recognition of gratitude as an obligation and a virtue provides us as professionals with a rationale for helping others.”

These words hit home with me as I thought about how truly grateful I am for your generosity of both time and financial support for the work of the Foundation. And that gratitude is doubled when put in context of the current challenging economic conditions. Giving and giving back have exacted a higher toll this past year, but still you continue to help others.

You have shared your professional expertise so that our pro bono financial counseling program, Financial Education Partners (FEP), can solve problems and create peace of mind for individuals on the brink of financial crisis.

You have made generous donations so that we can continue to build FEP in FSP Chapters throughout the country.

You have helped us celebrate and encourage excellence through your support of the Foundation’s other key initiatives—the American Business Ethics Award program, Paul S. Mills Scholarships, and Journal Author Awards.

You have set the standard for philanthropic distinction, and for this I am most grateful.

Thank you.

Roderick P. Hansen, CFP, CLU, ChFC
Chairman of the Board of Trustees

Mission Statement
To foster research, education, and ethical practice among financial service professionals to benefit the public.
Financial Education Partners

Financial Education Partners provides pro bono financial counseling to individuals in need who are referred to the program from community outreach organizations, such as Habitat for Humanity, the American Cancer Society, and the National Multiple Sclerosis Society. FEP is a recipient of the MS Society’s prestigious “Making a Difference” award.

American Business Ethics Award

American Business Ethics Award recognizes ethical practices in the American business marketplace.

2010 Recipients

Midsized Company: Merrick & Company, Aurora, Colorado
Large Company: Eat’N Park Hospitality Group, Homestead, Pennsylvania

Sources of Funds

- Corporations 39%
- Golf Tournament 2%
- Investments 19%
- Individuals 40%

Uses of Funds

- Fund-raising 36%
- Management/General 10%
- Mills Scholarships 12%
- Journal Author Awards 5%
- FEP 3%
- ABEA 33%

“Over the past 12 years, PAETEC has received numerous accolades regarding our network, customer service, and growth, among other things. However, personally as Chairman and CEO, the award I'm most proud of is our American Business Ethics Award in 2005…. Receiving the American Business Ethics Award has provided PAETEC dividends beyond measure.”

– Arunas Chesonis, Chairman & CEO, PAETEC, 2005 ABEA recipient

Programs

Paul S. Mills Scholarships

Paul S. Mills Scholarships encourage ongoing professional development among financial service practitioners.

2010 Recipients

Evan Fabricant, Richmond, Virginia
John K. Mulvey, CLU, ChFC, AEP, Albany, New York
Richard C. Murphy, CLU, LUTCF, Syracuse, New York
James R. Waldorf, CLU, CFP, Dallas, Texas
Scott R. Wollenberg, Houston, Texas

Journal Author Awards

Journal Author Awards advance scholarly research and writing to build the base of knowledge in financial services.

2010 Recipients

First Place:
  Kathleen M. Gounaris, PsyD, MBA, and Maurice F. Prout, PhD
Second Place:
  Steve Vernon, FSA
Third Place:
  Carl M. Rosenfeld, CPA, PFS, CFP, MST and Edd H. Hyde, CFP, CIMA, AIFA
## Foundation Contributors

### LIFETIME GIVING

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“The American Business Ethics Award is one of those rare recognitions for those companies who insist on a higher standard. Our employees proudly communicate our receipt of this award as validation of their efforts to act with integrity, communicate openly and honestly, and treat everyone with respect.”

– Larry Parsons, VP & Chief Ethics and Compliance Officer, Freescale Semiconductor, Inc., 2007 ABEA recipient
“Financial Education Partners is a great project. Years ago I learned that you have to give back in life. You can’t go through life and just take. My FEP client was going through a difficult divorce and I was able to give her some direction on health insurance and life insurance considerations. And by helping Ms. J., I became the beneficiary because I learned so much about others that I can apply in my practice.”

– Tom Parsons, CLU, AEP
Foundation Contributors

Stuart G. Tugman
Allan J. Turoff
Frank B. Urso
James R. Waldorf
David M. Watson
David R. Watson
Jon W. Webber
Mark A. Weber
Joseph Weinkle
Kelly A. Wellborn
William W. Werber
Western Massachusetts Chapter
Edward L. White
Joel K. Williamson
Rolf M. Winch
Mary C. Wysong
Ronald L. Yoder
Michael J. Youso
Alan R. Ziegler

Kelli J. Carmichael
Jack S. Couzens
Joseph L. Davis, Jr.
Joseph L. Dovi
Mark J. Dunlop
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Russell A. Smith
James B. Speights
Jim Tallarico
Paul A. Velho
Susan Wade
Arthur L. Way
Dennis M. Wilson
Walter R. Worley

“Being chosen as one of the Paul Mills Scholarship recipients was a wonderful honor…. It was also tremendous affirmation to know that I am approaching the financial services business the proper way for long-term success.”

– Evan Fabricant, 2010 Paul Mills Scholar

Pictured left to right, Rob Coleman, Jim Christian, Jennifer O’Neill, Mike O’Neill, winning foursome of the 2010 annual golf tournament to support the Foundation for FSP.
Paul S. Mills 2010 winners. Pictured standing (l to r) Richard Murphy, Scott Wollenberg, and Evan Fabricant. Seated are Jim Tyrpak and Jack Mulvey.

Keith G. Burck
Central Missouri Chapter
James M. Christian
Robert C. Coleman
Kay L. Dempsey
Richard M. Denton
Thomas G. Doncaster
Michael P. Dow
John R. Driskill
Samuel L. Farb, Jr.
Penn P. Foust
Colin M. Govan
Michael W. Halloran
Mark A. Hanna
Gayle C. Holcom
Rhoda Israelov
Terri Jeter-McAvoy
John B. King-Beckles
Kevin K. Kishimori
Margaret A. Kurtz
James B. Lammers
Gary E. Lanzén
Stephen F. Libby
Marshall Lipson
William D. Magee
John R. Martin
Donald W. Marx
Clark B. McCleary
Wayne O. McHargue
Ronald K. McQueen
John K. Mulvey, Jr.
Michael G. O’Neill
Terry L. Owens
Thomas L. Petsche
Geoffrey E. Pfeiffer
Edward H. Pike
Paul M. Pistilli
Jonathan H. Proby
Michael Quinlivan
Donald Reichert
Michael J. Reid
W. L. Seawell
Ray A. Silva
Robert O. Smith
Gary D. Speicher
John C. Still, III
Leo E. Strine
Bruce A. Tannahill

John E. T. Taylor
John R. Telich, Sr.
Gregory J. Terlecky
Stuart G. Tugman
Frank B. Urso
David R. Watson
Kelly A. Wellborn
Edward L. White
Rolf M. Winch
Michael J. Youso
Alan R. Ziegler

Centennial Club
$500 Pledge (over 5 years)

Daniel A. Caldwell
Robert H. Colyar
Leo C. Duffield, Jr.
Catherine Ellison
John L. Erskine
Marc D. Friedman
John E. Gilliam
Thomas F. Hegna
Martin F. Henderson
Laurene B. Prevette
David R. Stromecki
Ruth G. Timme
Jeffrey B. True
Allan J. Turoff
James R. Waldorf

2010 Golf Tournament Chairmen
Michael P. Dow
Geoffrey E. Pfeiffer

2010 Golf Tournament In-Kind Sponsor
Bruce A. Tannahill

2010 Golf Tournament Tee Sponsors
Mickey L. Batsell and Individual Commercial Brokerage
R. Clifford Berg, Jr.
Buffalo Chapter FSP
CBIZ
Central Illinois Chapter FSP
James M. Christian
Dallas Chapter FSP
Delaware Chapter FSP
Jack D. Dempsey
Richard M. Denton
Anthony J. Domino, Jr.
Michael P. Dow & Next Level Planning and Wealth Management
Eastern Iowa Chapter FSP
Eastern New York Chapter FSP
Greater Philadelphia Chapter FSP
Greensboro Chapter FSP

Our MS Chapter never hesitates to refer our clients to the FEP program. Questions are answered in a timely, direct, and experienced manner.”

– Audra Hindes, MSEd, MHC, Director, Clinical Programs, National Multiple Sclerosis Society, Southern California Chapter
To be honored by the Foundation directly speaks to the professional pledge taken the day I received my CLU designation many years ago.

– Richard C. Murphy, CLU, LUTCF, 2010 Paul Mills Scholar

“At Merrick, ethics is a core value with an expectation that it will be practiced every day by everyone. This award is recognition and validation that Merrick’s employees are focused on ethical behavior every day… .”

– Ralph W. Christie, Jr., PE, Chairman, President & CEO, Merrick & Company, 2010 ABEA recipient

GIVING OPTIONS

5-year Pledges
- Foundation Council: $1,500/year for 5 years
- Chairman’s Council: $500/year for 5 years
- Millennium Club: $200/year for 5 years
- Centennial Club: $100/year for 5 years

Annual Giving Levels
- Founder Level: $5,000 +
- Adviser Level: $1,000 to $4,999
- Planner Level: $500 to $999
- Mentor Level: $100 to $499
- Friend Level: Other gifts

Lifetime Giving Levels
- Trustees Circle: $25,000 +
- Stewards Circle: $10,000 to $24,999
- Scholars Circle: $5,000 to $9,999
- Leaders Circle: $2,500 to $4,999

Legacy Giving
Legacy giving provides a valuable way to support the Foundation’s mission. Please consider making the Foundation a part of your integrated estate and financial planning through gifts of life insurance and/or testamentary bequests. Contact Anne Rigney (arigney@financialpro.org) if you would like to discuss this option.