MISSION STATEMENT
We impact the lives of individuals with scholarships and financial education.
April 2019

**Dear Friends of the Foundation for Financial Service Professionals:**

Ashal, Jamie, and Amy are parents working toward an undergraduate degree to make better lives for their children. Bijoy is the first in his family to attend college. Gao wants to break the cycle of poverty that has affected his family and make a difference in the Appalachian Mountain community where he grew up. Ashley overcame the obstacles of a teenage pregnancy and an incarcerated father to earn an associate degree and begin her studies as a finance major at Southern Methodist University. Dai'Ja makes her own clothes to reduce the financial strain on her parents as she studies for her degree in business and risk management.

These stories provide a glimpse into the lives of a few recent Paul Mills Scholarship recipients—and help illustrate why this program is so important to us. Our scholarships are making a difference for students who don’t have many options or resources. They do, however, have hopes and dreams and clear goals, and they represent amazing promise and potential.

This is why your generosity means so much. Your gifts to the Foundation create the possibility of a successful future for the next generation. They translate the words of our mission statement (“we impact the lives of individuals with scholarship and financial education”) into action.

Thank you for all you give and all you do.

James S. Aussem, JD, AEP
President, Board of Trustees

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Paul S. Mills Scholarships

Paul S. Mills Scholarships provide need-based financial support to students pursuing undergraduate degrees in financial service-related fields. Specific scholarship amounts will vary depending on the funds available. The following recipients each received a $1,000 scholarship for the 2018-2019 academic year:

2018 RECIPIENTS

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Bijoy Shah, Glen Ellyn, IL
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Journal Author Awards

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


**First Place:** Lewis Hershey, PhD, MA, Annemarie M. Kelly, JD, LLM, and Boris Abbey, PhD, JD, MBA, for “Enabling ABLE: Five Potential Positives for Implementing the ABLE Act,” March 2017

**Second Place:** Robert Pokorski, MD, MBA, and Brett W. Berg, JD, LLM, CLU, ChFC, for “Retirement Planning: Coping with Higher Health Care Costs,” May 2017

**Third Place:** John L. Olsen, CLU, ChFC, AEP, for “Index Annuities: Looking under the Hood,” November 2017

Financial Education Partners

Financial Education Partners is a pro bono financial counseling program that works with the National Multiple Sclerosis Society and other community outreach organizations to offer financial guidance and hope for financial security to individuals in need. FEP is a recipient of the Multiple Sclerosis Society’s prestigious “Making a Difference” award.

Financials

**SOURCE OF FUNDS**

- Investments: 54%
- Contributions: 46%

**USES OF FUNDS**

- Mills Scholarship: 67%
- Journal Author Award: 12%
- Misc Programs: 7%
- Mgmt./General: 12%
- Fundraising: 2%