

2008

FOUNDATION FOR FINANCIAL SERVICE PROFESSIONALS

ANNUAL REPORT

FOUNDATION FOR™
FSP
Financial Service Professionals

Foundation for
Financial Service Professionals

Mission Statement

*To foster research,
education, and ethical
practice among
financial service
professionals to
benefit the public.*

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Dear Friends of the
Foundation for Financial Service Professionals:

As individuals, we are presented with many opportunities to make a difference in the lives of others. Of course, we cannot possibly embrace all of them. This is why it means so much to me, personally, that you have chosen to support the Foundation. Your generosity has truly made a difference in all facets of the Foundation's mission and programs. We are especially grateful for how you have nurtured our Financial Education Partners (FEP) program with so many of you giving of your professional expertise to help people facing financial crises. The Foundation is proud of the good work we have been able to do in the brief history of the FEP program and we know it would not have happened without your help.

We are also pleased about the prestige and recognition associated with our American Business Ethics Award, now in its 15th year, as well as the Paul S. Mills Scholarship Fund, which has been providing educational opportunities to financial service professionals for over 25 years.

This report is a testament to each of you, your time, energy, expertise, and generosity.



Thank you,
Richard H. Linsday, CLU, ChFC, AEP
Chair, Board of Trustees

PROGRAMS

Paul S. Mills Scholarships

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

2008 Recipients

Mark J. Dunlop, CLU, ChFC, CFP, REBC, RHU, CEBS, MSFS, MSM, AEP, St. Louis
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Journal Author Awards

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

2008 Recipients

First Place: Moshe A. Milevsky, PhD
 Second Place: Susan Matour, JD, and Maurice F. Prout, PhD
 Third Place: John T. Adney, JD
 Bryan W. Keene, JD, and Kirk Van Brunt, JD

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, American Cancer Society, and the National Multiple Sclerosis Society. FEP was the 2007 recipient of the MS Society's "Making a Difference" award.

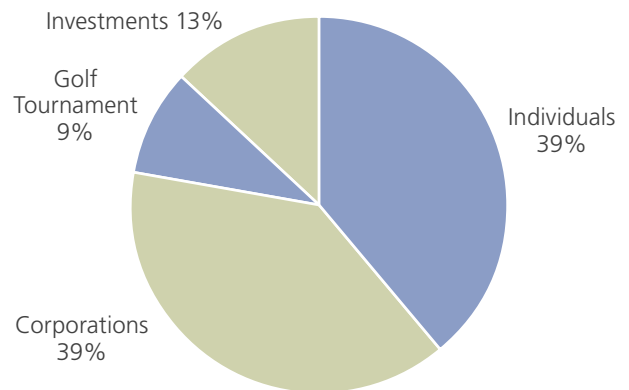
American Business Ethics Award

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

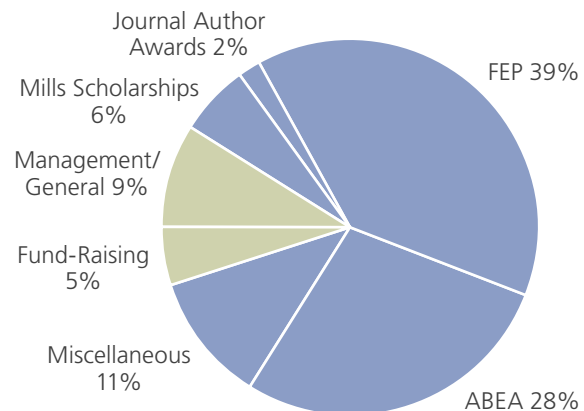
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Small Company: Atlantic Webworks, Greensboro
 Midsized Company: Daisy Brand, Dallas
 Large Company: General Mills, Minneapolis

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"As a result of the Paul Mills program, which demands a demonstrated commitment to lifelong education, volunteerism and ethical practice, my peers have commented that they now better understand what professionalism means in the financial services field."

— Mark J. Dunlop,
2008 Paul Mills Scholar

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“I was honored to be named a Paul Mills Scholar in 2008. It has been humbling to be counted among such deserving associates and I thank the Foundation for their commitment to fostering ethical behavior around the world.”

— Gregg Schlaudecker,
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“Receiving the 2008 American Business Ethics Award was a wonderful affirmation of Atlantic Webworks’ commitment to ethical practices and publicly identifies us as a company that does the right thing. This recognition has afforded us opportunities to form new strategic partnerships and garner new business, and has brought us inquiries from prospective employees who value working for an ethical firm. This is a wonderful title that our team will continue to live up to.”

— Adrienne Cregar Jandler, President, Atlantic Webworks

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“FEP gives information, direction, and hope...we can take such a small amount of time and give so much...”

— Patricia Nowak, CLU, ChFC, on her experience working with MS clients throughout Connecticut, Vermont, Massachusetts, and Rhode Island

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Introducing the Millennium Club...



Michael J. Reid, CLU, ChFC, pledged \$1,000 to the Foundation and became the first member of the Millennium Club. The Millennium Club calls for an annual gift of \$200 for five years.

...and the Foundation Council



Joseph E. Frack, CPA, became the first member of the Foundation Council with a pledge of \$1,500 for five years – a total gift of \$7,500.

These pledge campaigns will provide the Foundation with more predictable sources of revenue, reduce administrative expenses, and increase the availability of funds to directly support the Foundation's mission.



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