

ALPHA OMICRON PI FOUNDATION'S  
2017-2018 INVESTMENT REPORT

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ALPHA OMICRON PI  
FOUNDATION AND YOU,

*Yes, You!*





## *Dear sisters and friends,*

You, yes, YOU are the reason that our Foundation exceeded \$1 million in grants during our 40th Anniversary, and for the very first time in our history! As sisters of Alpha Omicron Pi, we seek to *Inspire Ambition* through your gifts back to our sisterhood which directly impact sisters today, tomorrow and forever. Together, we inspire positive change and growth within our Fraternity and are united by our common vision to provide opportunities and experiences that build confidence and inspire our members to take action and lead.

It is an exciting time at the Alpha Omicron Pi Foundation! We have an energized staff led by our Executive Director, Kristie Prichard Ryan; and our Board of Directors, Foundation Committees, Ambassadors and volunteers have all been working hard to serve our donors, sisters and friends of the Foundation. We recently updated our mission statement to reflect who we are as a Foundation. It now reads, "The AOII Foundation invests in our sisters and inspires a lifetime of giving to innovative leadership, educational and philanthropic causes." Your gifts towards these vital initiatives ensure that Alpha Omicron Pi can support our sisterhood both now and for years to come.

Additionally, we have begun to implement a new strategic plan for the Foundation that will direct our staff and Board over the next five years. One of our primary goals will be to align the interests of our donors to the needs of our sisterhood. Support of educational and leadership programs is vital

as we continue to welcome bright and innovative AOII sisters that will not only shape the future of our Fraternity but will shape the future of their communities and the world around them.

As I approach the end of my term as the Foundation Board President, I want to sincerely thank each of you for the support you have given to our Foundation. As you will see in the following pages, last year we were able to increase the funding for educational & leadership grants, scholarships and arthritis. Your donations are 100% responsible for this growth. You, yes, YOU are the reason we can share our story with future generations of AOIIs, celebrating a shared commitment to the principles established by four women who pledged themselves to one another more than 121 years ago. As we embrace a new year filled with opportunity and growth, your heart-felt gifts of all amounts are changing lives and shaping our future.

*Roses,*  
*Judy*

Judy Gambrel Flessner  
AOII Foundation President  
Iota, University of Illinois



*Alpha Omicron Pi Foundation*



## *Our Board*

(FRONT ROW FROM LEFT TO RIGHT)

MICHELLE SERRANO LOPEZ (Delta Theta, Texas Woman's U), Secretary; GAYLE FITZPATRICK (Alpha Rho, Oregon State U), International President; JUDY GAMBREL FLESSNER (Iota, U of Illinois), President; ANDREA DILL (Chi Psi, California Polytechnic State U), Treasurer

(BACK ROW FROM LEFT TO RIGHT)

RISSA REDDAN (Omega, Miami U), Director; BARBARA HISS BRUNING (Theta Psi, U of Toledo), Director; KANDY CASSANO BERNSKOETTER (Sigma, U of California, Berkeley), Director; MEAGAN DAVIES (Alpha Chi, Western Kentucky U), Director

## FOUNDATION *mission statement*

The AOII Foundation invests in our sisters and inspires a lifetime of giving to innovative leadership, educational and philanthropic causes.

## FOUNDATION BOARD OF DIRECTORS

JUDY GAMBREL FLESSNER, Iota, President

ANDREA DILL, Chi Psi, Treasurer

MICHELLE SERRANO LOPEZ, Delta Theta, Secretary

KANDY CASSANO BERNSKOETTER, Sigma, Director

BARBARA HISS BRUNING, Theta Psi, Director

MEAGAN DAVIES, Alpha Chi, Director

RISSA REDDAN, Omega, Director

GAYLE FITZPATRICK, Alpha Rho, International President

## FOUNDATION STAFF

KRISTIE PRICHARD RYAN, CFRE, Rho Omicron, Executive Director

JANA ADKINS, Rho Omicron, Director of Donor Relations

LUCY ANN GOSSETT, Pi Omicron, Administrative Services Manager

COURTNEY STAFFORD, Chi Omega Fraternity, Director of Advancement

LAURA WARD, Nu Omicron, Controller

# 2017-2018 FINANCIAL REPORT

## EXPENSES

\$1,932,600

TOTAL EXPENSES



35%  
\$684,844  
Arthritis Grants



10%  
\$200,262  
Educational and  
Leadership Grants



12%  
\$232,168  
Scholarship  
Program



17%  
\$323,085  
General &  
Operating  
Expenses



20%  
\$395,237  
Fundraising  
Expenses



5%  
\$84,198  
General Program  
Expenses



1%  
\$12,806  
Ruby Fund  
Program  
Grants

## BALANCE SHEET

Cash and Cash Equivalents	\$532,743
Marketable Securities	\$7,287,030
Receivables	\$105,424
Fixed Assets	\$8,520
Total Assets	\$7,933,717
Liabilities	\$985,179
Total Net Assets	\$6,948,538
Total Net Assets & Liabilities	\$7,933,717

Financial data for the Alpha Omicron Pi Foundation as of and for the fiscal year ending June 30, 2018.



REVENUE  
\$1,836,654  
TOTAL REVENUE

41% \$747,207  
Arthritis Fund  
Gifts

27% \$498,733  
Loyalty Fund/  
Unrestricted  
Gifts

17% \$308,506  
Investment  
Income\*

8% \$155,647  
Scholarship/  
Fraternity Grant  
Funds Gifts

4% \$74,223  
Other

3% \$52,338  
Ruby Fund  
Gifts

\* Includes realized & unrealized investment gains & losses

# GRANTS & SCHOLARSHIPS

TOTAL GRANTS AWARDED THANKS TO DONOR SUPPORT IN 2017-2018:

**\$1,037,522**

LARGEST AMOUNT TO DATE!

Arthritis [66%] Scholarships [23%] Ruby Fund [1%]  
Educational & Leadership Programming [10%]



## RUBY FUND:

8 recipients =  
**\$12,304**  
awarded

## EDUCATIONAL & LEADERSHIP PROGRAMMING: \$105,450

Fraternity programs funded for 2018-2019:

- Educational Leadership Consultants (ELC) Program & Training
- International Convention Programming
- Leadership Academy Scholarships
- Fulfilling the Promise: Online Training Program
- Training Ambassadors Program
- Leadership Scholarships
- Arthritis Foundation Partnership and Events

**ARTHRITIS: \$683,218** Arthritis programs and research initiatives funded for 2018-2019 thanks to donor support and AOII chapter events.



AOII-funded backpack from the National Backpack Program

- Arthritis Foundation, Juvenile Arthritis Camps: \$175,000
- Arthritis Foundation, Juvenile Arthritis Conference: \$175,000
- Arthritis Foundation, Juvenile Arthritis Powerpacks: \$50,000
- Arthritis Foundation, Welcome to Campus program: \$91,000
- AOII Chapter Arthritis Mini-Grants: \$83,218
- LiveYES! app: \$100,000
- Vanderbilt University Research Grant: \$9,000

## SCHOLARSHIPS:

**132** Scholarships Awarded = **\$231,000**  
**4** Leadership Scholarships Awarded = **\$5,550**



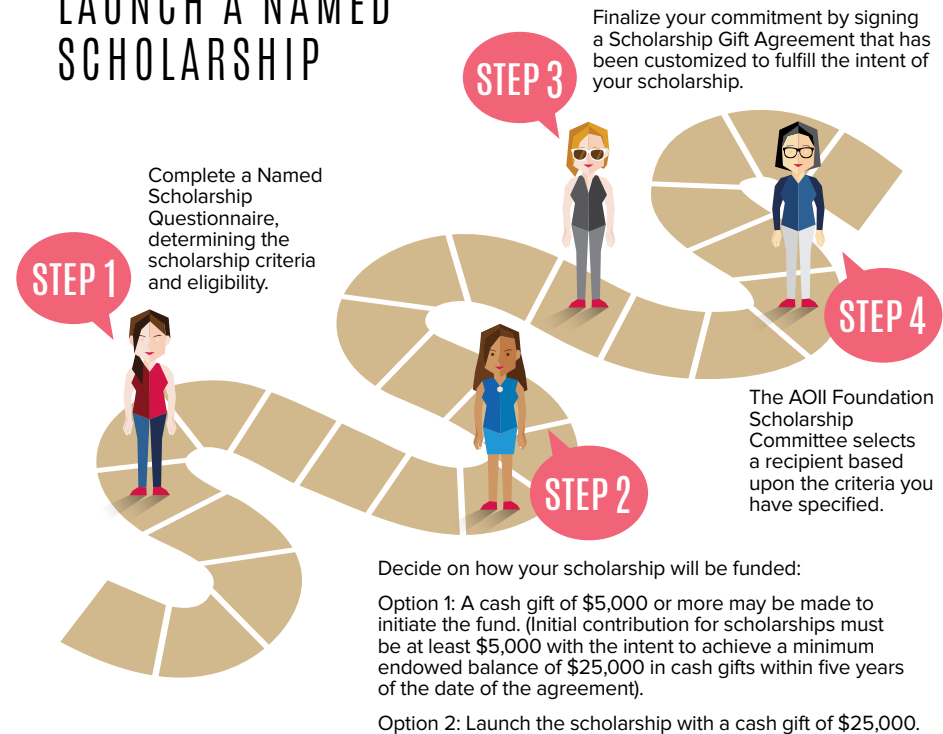
## NEW SCHOLARSHIPS LAUNCHED

**5** New Named Scholarships + **1** New Leadership Scholarship



**1 IN 4**  
APPLICANTS AWARDED  
A SCHOLARSHIP

## LAUNCH A NAMED SCHOLARSHIP



# SCHOLARSHIP RECIPIENTS

CONGRATULATIONS TO OUR 2018-2019 SCHOLARSHIP RECIPIENTS!

## NAMED SCHOLARSHIPS

### Undergraduate Recipients

ALPHA TAU CHAPTER SCHOLARSHIP  
Logan Haussman,  
Beta Phi

AMY ZIEGLER BETTENCOURT (THETA) SCHOLARSHIP  
Jenna Stephany,  
Gamma Omicron

ANGELS OF KAPPA THETA MEMORIAL SCHOLARSHIP  
McKenna Gallagher,  
Theta Iota

BARBARA HISS BRUNING SCHOLARSHIP  
Randie Caine,  
Sigma Delta

BARBARA KOHLER - TAU CHAPTER SCHOLARSHIP  
Madison Sutton,  
Tau

BETA PHI CENTENNIAL SCHOLARSHIP  
Morgan Reid,  
Beta Phi

BETTY DUKE SCHOLARSHIP  
Nikki Stone,  
Delta Nu

BEVERLY LANDES TOWNSEND - ALPHA PHI SCHOLARSHIP  
Julian Kaptanian,  
Alpha Phi

BIRDIE HANSON NURSING SCHOLARSHIP  
Adira Cohen,  
Omicron Pi

CANDY CARLISLE DERIVAUX MEMORIAL SCHOLARSHIP  
Melanie Glisson,  
Nu Beta

CAREY GRINER MEMORIAL - KAPPA KAPPA CHAPTER SCHOLARSHIP  
Kelsi Brown,  
Kappa Kappa

CARLI E. SEARS MEMORIAL SCHOLARSHIP  
Emma Cousins,  
Nu Beta

CAROLE JURENKO JONES - ALPHA DELTA CHAPTER SCHOLARSHIP  
Christianna Mason,  
Alpha Delta

CAROLINE CRAIG LAZZARA SCHOLARSHIP  
Rachel Thompson,  
Phi Gamma

CHARLENE M. FAVRE SCHOLARSHIP  
Alison Garcia,  
Kappa Chi

CLARANNE MARCHESE MEMORIAL SCHOLARSHIP  
Gabriella Hosack,  
Phi Lambda

DAWN TRON ELLIOT SCHOLARSHIP  
Lindsay Kaser,  
Omega

CENTENNIAL SCHOLARSHIP  
Alexandra Brown,  
Pi Delta

DELTA RHO SCHOLARSHIP  
Alice Khechoyan,  
Delta Rho

DINA D'GEROLAMO - KAPPA TAU SCHOLARSHIP  
Jessica Litoff,  
Kappa Tau

DOLORES RHODES SCHOLARSHIP  
Julia Hamilton,  
Alpha Delta

DOTTIE LEEK - NU OMICRON SCHOLARSHIP  
Tessa Jensen,  
Nu Omicron

GAYLE FITZPATRICK SCHOLARSHIP  
Emma Tornberg,  
Alpha Rho

GINGER BANKS SCHOLARSHIP  
Anna Campbell,  
Alpha Delta

IOTA CHAPTER SCHOLARSHIP  
Audrey Ashburn,  
Iota

IOTA SIGMA ENDOWED SCHOLARSHIP  
Kaitlyn Sorley,  
Iota Sigma  
Rachel Wilkens,  
Iota Sigma

JASMINE QUEEN - SIGMA TAU CHAPTER SCHOLARSHIP  
Olivia Snyder,  
Phi Alpha

JENNIFER COMBS - CHI LAMBDA CHAPTER SCHOLARSHIP  
Vaishnavi Ravipati,  
Chi Lambda

JOLEEN HEIBERT FIELDS - DELTA OMEGA SCHOLARSHIP  
Madison Gish,  
Delta Omega

JULIE A. BRINING MEMORIAL SCHOLARSHIP  
Emily Viglione,  
Gamma Delta

KAPPA GAMMA CHAPTER SCHOLARSHIP  
Emma Morton,  
Kappa Gamma

KAREN FRIED KELONE "HEALING HAND" SCHOLARSHIP  
Lauren Margliotti,  
Alpha Mu



and connections with other ladies that I know will be beneficial in my collegiate experience and beyond college.

Attending Leadership Institute was an extraordinary experience that impacted me as a woman, a leader in my chapter, and a leader in other campus organizations....Leadership Institute was an amazing experience that has fired me up going into this upcoming school year. It was so nice to spend a weekend with my international sisters and learn alongside them. I made so many great friendships

## MADISON ELZEY

Lambda Chi (LaGrange College) '16

2018 Julie A. Brining Emerging Leader Fellowship Award

KERRI KEITH MEMORIAL - GAMMA SIGMA CHAPTER SCHOLARSHIP  
Emily Pierce,  
Gamma Sigma

LANGSTON/PURDY - LAMBDA SIGMA/ALPHA DELTA CHAPTERS SCHOLARSHIP  
Ashley Bough,  
Lambda Sigma

LEGACY OF LOYALTY TO LAMBDA TAU SCHOLARSHIP  
Saydee Barr,  
Lambda Tau

LOU MEGINNESS COUCH - SIGMA OMICRON CHAPTER SCHOLARSHIP  
Jennifer Fuller,  
Sigma Omicron

MARTHA MCKINNEY WILHOITE - THETA CHAPTER SCHOLARSHIP  
Skylar Drefcinski,  
Beta Phi

MARY MCCAMMON WILLIAMS AND ROBERT E. WILLIAMS SCHOLARSHIP  
Seraph Bao,  
Beta Kappa

MICHAELLA WALSH-LIBBY SCHOLARSHIP  
Abby Perasso,  
Pi Delta

MURIEL T. MCKINNEY SCHOLARSHIP  
Ashley McFarquhar,  
Kappa Phi

NU IOTA CHAPTER SCHOLARSHIP  
Emma Lentsch,  
Zeta

PAT HAYES CUTLIP & DOTTI HAYES CUTLIP SCHOLARSHIP  
Saven Morris,  
Beta Zeta

PAULA JONES SALTER MEMORIAL - NU BETA CHAPTER SCHOLARSHIP  
Chloe McIntire,  
Nu Beta

PEG CRAWFORD - PHI CHI SCHOLARSHIP  
Michaela Mullison,  
Phi Chi

PHYLLIS R. AUSTIN SCHOLARSHIP  
Jacqueline Anderson Enni,  
Lambda

RACHEL ALLEN - ALPHA CHI CHAPTER SCHOLARSHIP  
Hannah White,  
Alpha Chi

RHO OMICRON CHAPTER SCHOLARSHIP  
Sarah Fagiana,  
Rho Omicron

ROBERT & ELEANORE MACCURDY SCHOLARSHIP  
Tara Principe,  
Gamma Delta

RUTH E. THOMPSON MEMORIAL SCHOLARSHIP  
Eleanor Kaverman,  
Beta Phi

SABRINA KEENE SCHOLARSHIP  
Morgan Kiser,  
Omega Sigma

SUSAN DANKO SCHOLARSHIP  
Mary Kate Cartwright,  
Phi Upsilon

TERRY MIZE PALMER - LAMBDA OMICRON SCHOLARSHIP  
Virginia Lea,  
Lambda Omicron

TERRY MIZE PALMER - PHI ALPHA SCHOLARSHIP  
Abigail Morehouse,  
Phi Alpha

#### Graduate Recipients

ALUMNAE CHAPTER HONOR SCHOLARSHIP  
Elizabeth Coleman,  
Delta Beta

HELEN HALLER SCHOLARSHIP  
Morgan Harmon,  
Rho Omicron

KAREN TUCKER CENTENNIAL SCHOLARSHIP  
Ana Aguilar,  
Tau Omega

LAURA GILLIAM MCDOWELL BETA PHI SCHOLARSHIP  
Cassandra Backovsky,  
Mu Lambda

LORRAINE CHANATRY-HOWELL SCHOLARSHIP  
Nicole Busboom,  
Zeta

NANCY MCCAIN MEMORIAL SCHOLARSHIP  
Claire Corvari,  
Phi Upsilon

RHO CHAPTER SCHOLARSHIP  
Kathleen McGurty,  
Beta Eta

SAN DIEGO ALUMNAE CHAPTER HONOR SCHOLARSHIP  
Erin Furnary,  
Xi Rho

### DIAMOND JUBILEE SCHOLARSHIPS

#### Undergraduate Recipients

Alexandra Anderson,  
Gamma Omicron

Caroline Bailey,  
Nu Beta

Haley Blanchard,  
Lambda Sigma

Sadie Bryant,  
Xi Omicron

Erica Casey,  
Alpha Phi  
Collytte Cederstrom,  
Chi Phi

Abigail Crothers,  
Omega

Hannah Davis,  
Chi Psi

Caroline DeWitt,  
Beta Eta

Emily Dickson,  
Lambda Rho

Alexandra Eby,  
Nu Omega

Madison Elzey,  
Lambda Chi

Kasey Felix,  
Phi Beta

Sydney Finkelstein,  
Iota

Chloe Fournier,  
Lambda Epsilon

Emalie Freitas,  
Gamma Alpha

Alexandra Habeck,  
Phi Delta

Katarina Hier,  
Beta Gamma

McKenna Horsley,  
Kappa Omega

Abigail Iuorio,  
Iota

Katherine Johnson,  
Alpha Pi

Samantha Josselyn,  
Epsilon Omega

Cheyenne Kidd,  
Lambda Rho

Erica King,  
Lambda Rho

Karalee Kothe,  
Alpha Phi

Laura Leffel,  
Zeta Pi

Sophia Liu,  
Alpha

Rebecca Mader,  
Xi Omicron

Chesley Martin,  
Lambda Chi

Meegan Mayer,  
Iota

Laura McAdam,  
Alpha Theta

Kimberly McCann,  
Phi Beta

Katherine McKay,  
Upsilon

Julia Morandi,  
Lambda Upsilon

Emily Ruble,  
Alpha Chi

Alicia Serafino,  
Alpha Mu

Anne Stewart,  
Lambda Sigma

Rachel Weaver,  
Alpha Delta

Jamie Weisberger,  
Alpha Delta

Madison White,  
Alpha Chi

Casey Wolfe,  
Alpha Phi

#### Graduate Recipients

Kelly Abbott,  
Sigma Phi

Merideth Birginske,  
Sigma Omicron

Katherine Bonner,  
Sigma Delta

Lora Buechele,  
Chi Theta

Carrigen Cain,  
Kappa Chi

Emilia Carro,  
Delta Nu

Briana D'Ambrosia,  
Iota Theta

Meagan Davies,  
Alpha Chi

Megan Dougherty,  
Pi Delta

Alessandra Ferrero,  
Omicron

Allison Glascock,  
Alpha Chi

Courtney Hart,  
Kappa Tau

Jessica Hastings,  
Alpha Delta

Chelsea Hinkle,  
Omega Sigma

Emma Huber,  
Delta Tau

Kailey Introcaso,  
Gamma Omicron



The object of our fraternity explicitly states to, “stand at all times for character, dignity, scholarship, and college loyalty,” and the AOII Foundation’s dedication to awarding students who achieve, not only as students, but as active members of their college community, is a testament to its dedication to the values and causes at the center of our sisterhood. I am beyond honored to have been a recipient of the Diamond Jubilee scholarship and hope that I can utilize its funds to continue not only my education, but my growing passion for serving a community that is often rendered voiceless as I earn my Masters in Speech-Language Pathology.

## ALLISON GLASCOCK

Alpha Chi (Western Kentucky University) '15  
Graduate, Diamond Jubilee Scholarship Recipient

Samantha Marscio,  
Phi Lambda

Alexandria Mickler,  
Mu Lambda

Autumn Moore,  
Delta Pi

Chelsea Moravek,  
Iota

Nicole Quinones,  
Kappa Omicron

Madeline Savage,  
Nu Omicron

Sydney Sherick,  
Alpha Phi

Rosa Taylor,  
Theta Pi

Jennifer Terranova,  
Theta Pi

Hannah VanBuiten,  
Pi Delta

Caraline Vaughn,  
Sigma Omicron

Emma Weiland,  
Alpha Pi

Kaitlin Wells,  
Alpha Chi

### LEADERSHIP SCHOLARSHIPS

CRYSTAL GRAFTON COMBS EMERGING LEADER FELLOWSHIP AWARD  
Hannah Vogelsang,  
Omicron Pi

JULIE A. BRINING EMERGING LEADER FELLOWSHIP AWARD  
Madison Elzey,  
Lambda Chi

OMEGA CHAPTER LEADERSHIP SCHOLARSHIP  
Cassidy Hemm, Omega

UIFI SCHOLARSHIP  
Natalie Schultz,  
Gamma Alpha

### NEW NAMED SCHOLARSHIPS

BIRDIE HANSON NURSING SCHOLARSHIP

CRYSTAL GRAFTON COMBS EMERGING LEADER FELLOWSHIP AWARD

DAWN TRON ELLIOT SCHOLARSHIP

RUTH E. THOMPSON MEMORIAL SCHOLARSHIP

TERRY MIZE PALMER SCHOLARSHIPS



## THE 1897 SOCIETY

is in honor of the founding of Alpha Omicron Pi in 1897 and serves as our leadership giving society. This society was launched in 2013 to recognize a very prestigious group of Foundation donors. Sisters and friends who make a leadership gift of \$1,897 or above to our Loyalty Fund annually are recognized as members of this society.



*M*y wonderful journey with Alpha Omicron Pi began during my collegiate years at Texas Woman's University, and I have sought to find ways to give back to our Fraternity ever since. It was actually one of my Delta Theta sisters who spoke with me about the 1897 Society and the contributions I could make to support a variety of Fraternity programs. It brings me great joy to support

the work of the Fraternity and do so in a way that works best for me. Because the AOII Foundation offers a monthly giving option, I am able to give my contribution over a period of time. I believe in the sorority experience and know there are so many positive life skills that can be learned when our members have access to high-quality programs and supportive environments. My monthly gift goes directly to the Loyalty Fund, which supports areas with greatest need, like Leadership and Educational Grants. It feels good to know my gift is making an impact on current and future generations of AOIIs.

### NICOLE CRONENWETT

Delta Theta (Texas Woman's University) '92  
1897 Society Member and Monthly Donor



Allison Allgier, Epsilon Omega  
Phyllis Austin, Nu Lambda  
Kandy Bernskoetter, Sigma  
Julie Bishop, Gamma Theta  
Susan Bonifield, Nu Beta  
Lacey Bowman, Chi Delta  
Barbara Bruning, Theta Psi  
Liz Coffey, Chi Lambda  
Jo Davis Cole, Gamma Sigma  
Linda Collier, Chi Omicron  
Crystal Combs, Nu Beta  
Kath Conner, Nu Iota  
Amber Countis, Pi  
Peg Crawford, Iota  
Nicole Cronenwett, Delta Theta  
Thelma Culverson, Kappa Theta  
Susan Danko, Phi Upsilon  
Tamee Dark, Lambda Tau  
Meagan Davies, Alpha Chi  
Andrea Dill, Chi Psi  
Kathleen Donohue, Epsilon Chi  
Kelly Farrell-Oliverson, Chi Lambda  
Rene Fitzgerald, Pi Kappa  
Gayle Fitzpatrick, Alpha Rho  
Judy Flessner, Iota  
Phyllis Gilson, Sigma Phi  
Lori Goede, Gamma Omicron  
Rachel Grace, Nu Beta  
Linda B. Grandolfo, Nu Iota

Melanie Graper, Nu Lambda  
Jennifer Greulich, Alpha Chi  
Suan Guess-Hanson, Beta Lambda  
Beverly Hatcher, Theta Psi  
Nancy Hohmann, Phi  
Grace Houston, Lambda Tau  
Martha Houston, Pi Kappa  
Patricia Howard-Peebles, Phi  
Barbara Hunt, Phi Delta  
Karen Ihrig, Nu Iota  
Kathy Jensen, Theta Omega  
Sally Cash Johnson, Delta Epsilon  
Carole Jones, Alpha Delta  
Frances Kende, Omega  
Jacqueline Koustrup, Beta Lambda  
Caroline Lazzara, Lambda Beta  
Troy LeForge, Beta Phi  
Michelle Lopez, Delta Theta  
Karen Marchese, Phi Lambda  
Barbara Maxwell, Iota Alpha  
Pam Mearsheimer, Phi Chi  
Erica Mohai, Beta Gamma  
Dana Moreland, Delta Alpha  
Lisa Niedenthal, Beta Phi  
Terry Palmer, Phi Alpha  
Koren Phillips, Phi Chi  
Francey Porter, Omega  
Becky Ratterman, Rho Omicron  
Rissa Reddan, Omega

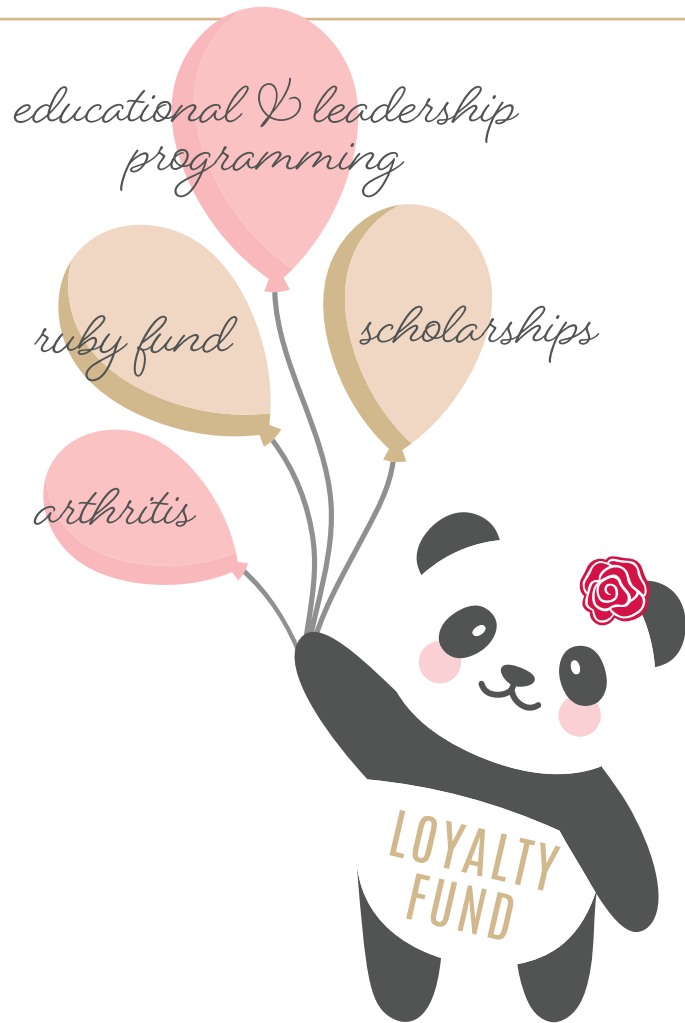
Kristie Ryan, Rho Omicron  
Sara Simms-Finan, Kappa Alpha  
Carol Stevenson, Omega  
Connie Stevenson, Gamma Omicron  
Susan Story, Omega Xi  
Debbie Tam, Beta Phi  
Jane Tessmer, Gamma Theta  
Maureen Tokar, Theta Eta  
Dionn Tron, Kappa Alpha  
Cindy Visot, Kappa Tau  
Dian Volkmer, Tau Delta  
Sally Wagaman, Sigma Tau  
Susanne Wakefield, Upsilon  
Jessie Wang-Grimm, Phi Chi  
Mary Williams, Phi  
Anne Wilmes, Chi Lambda  
Leslie Wininger, Kappa Omega  
Judy Zawacke, Beta Lambda  
Barb Zipperian, Kappa Kappa  
Barbara Zolnierczak, Beta Phi

### COMPANIES

Broer-Freeman  
CSL Management, LLC  
Jurenko Foundation  
Lee, Danner & Bass, Inc.  
Sandmeyer Steel



# THE LOYALTY FUND



The Loyalty Fund supports all of the other funds of the AOII Foundation.

Gifts to the Loyalty Fund allow the Foundation Board of Directors the ability to direct funding where it's needed most. Therefore, we are able to continue awarding **RUBY FUND GRANTS, SCHOLARSHIPS, EDUCATIONAL & LEADERSHIP PROGRAMMING** to the Fraternity and **ARTHRITIS GRANTS**.

Without donations to the Loyalty Fund, we can't continue administering these vital programs that support our sisters at every age.

ALPHA OMICRON PI  
FOUNDATION AND YOU,

*Yes, You!*



## RAISING ROSES



Raising Roses was a great way for me to give back to something so close to my heart. It inspired me to start giving as a collegiate member and will encourage me to keep giving throughout my life! It is great to be able to know that the money we give goes to support our sisters!

### MADISON ROXBURY

Sigma Rho (Slippery Rock University) '16  
Raising Roses Collegiate Donor

# GIVING OPPORTUNITIES TO MATCH YOUR NEEDS

## 1897 SOCIETY

The 1897 Society is in honor of the founding of Alpha Omicron Pi in 1897 and serves as our leadership giving society. Sisters and friends who make an annual contribution of \$1,897 or above to our Loyalty Fund are recognized as members of this society.

## RAISING ROSES

Raising Roses is the AOII Foundation's new annual giving society available only to collegiate members who make an annual gift of \$18.97 or above to the Loyalty Fund. This exciting program allows collegiate members to give back to AOII, while recognizing the importance of supporting our sisterhood from the very beginning. Collegiate members who join Raising Roses will be recognized with a commemorative AOII gift for becoming a member of Raising Roses.

## SECOND CENTURY SOCIETY

The Second Century Society is reserved for alumnae who remember the AOII Foundation with a planned gift. Planned gifts include, but are not limited to: cash, bonds, stock, securities, personal property, retirement plan assets and insurance policies. Visit our website at [www.aoiifoundation.org](http://www.aoiifoundation.org) for more information on the Second Century Society.

## MONTHLY DONATIONS

Monthly donations can be made as a one-time gift or recurring monthly contribution, through bank draft or credit card.

## MEMORIAL & HONOR GIFTS

Honor an AOII sister, friend or loved one with a memorial or tribute gift in her name.

## CORPORATE MATCHING GIFTS

Several companies match an employee's personal donation to nonprofit, tax-exempt foundations. Ask your employer if they participate in a gift-matching program.

## PLANNED GIFTS / BEQUESTS

A planned gift can meet your short and long-term charitable and financial goals. Planned gifts include, but are not limited to: cash, bonds, stock, securities, personal property, retirement plan assets and insurance policies. Visit our website at [aoiifoundation.org](http://aoiifoundation.org) for more information on the Second Century Society.

## ENDOWMENTS

Endowments, for a scholarship or other restricted purpose, can be established outright or through planned gifts.

## WAYS TO MAKE YOUR GIFT:



### ONLINE

Visit the Foundation website at [aoiifoundation.org](http://aoiifoundation.org) and click on the "Donate" button. Alpha Omicron Pi Foundation accepts VISA, MasterCard, American Express and Discover.



### CASH OR CHECK

Please mail donations to:  
Alpha Omicron Pi Foundation  
5390 Virginia Way  
Brentwood, TN 37027



### PHONE

We would love to speak with you! Give us a call at 615-370-0920 to make your gift by phone.



*Chapter photos courtesy of the Epsilon Gamma chapter.*

## INFORMATION UPDATES

To update your name or other information, please contact us at [foundation@alphaomicronpi.org](mailto:foundation@alphaomicronpi.org).

Additionally, if you know of a sister listed in this report that has passed away, please contact us.

## FINANCIAL INFORMATION

Gifts to the Foundation are tax deductible on a U.S. return as allowed by law.

The AOII Foundation is a 501 (c) (3) nonprofit organization.

The fiscal year reported is July 1, 2017-June 30, 2018.

The annual audit is performed by Mullins, Clemmons & Mayes, PLLC.

The Foundation's federal tax id number is 58-1343315.

The Alpha Omicron Pi Foundation's IRS-990 may be viewed at [guidestar.org](http://guidestar.org).

Investment assets are managed by Lee, Danner & Bass, Inc.

## PRIVACY STATEMENT

Charitable organizations are occasionally asked to sell or lease the names and addresses of donors to other parties. As determined by the Foundation Board of Directors, the policy of the Alpha Omicron Pi Foundation strictly prohibits such action. AOII Foundation donor records are not sold, bartered, leased, exchanged or otherwise provided by the Foundation to outside organizations.



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