



GIVING 2018

With your support, MOAA is helping military families thrive.





**LT. GEN. DANA T. ATKINS,
USAF (RET)**
MOAA President and CEO
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We're very pleased to present this combined annual report of our two MOAA charities: the MOAA Foundation and the MOAA Scholarship Fund. These two award-winning MOAA subsidiaries continue to have a significant, positive impact on our nation's military and veteran families every year, and 2018 was certainly no exception.

Before you read the reports, however, I'd like to ask you to take just a few moments to consider the future of these two wonderful organizations. As you know, last year, the MOAA Scholarship Fund celebrated its 70th anniversary. Since 1948, the MOAA Scholarship Fund has provided more than \$150 million in educational assistance to more than 15,000 military family children. The MOAA Foundation, on the other hand, is now entering just its fifth operational year. The MOAA programs it funds help more than 100,000 military and veteran families annually. Despite their obvious differences, our two MOAA charities share a common mission and a common reality: They both serve uniformed and veteran families, and they both rely heavily on individual contributions from MOAA members to sustain them.

Individual donations and bequests are the two most vital sources of sustaining revenue for most nonprofit organizations, and a robust, annual individual-giving program forms the basis for a successful planned giving program (bequests). But only about 8 percent of our 350,000 MOAA members ever have given to either charity. Moreover, a recent MOAA member demographic survey revealed **43 percent** of MOAA members have a net worth over \$1 million, and the **average MOAA member age is 68**. Given these facts, let me illustrate the potential giving power our members could have going forward.

As many of you have heard me say, if just one in 10 MOAA members — about 35,000 members — gave just \$50 once a year to each MOAA charity, both charities would receive \$1.75 million annually. That's more than enough to sustain their operation in perpetuity. If we take it a step further, and just 1 percent of those same 35,000 MOAA members who give annually — that's just 350 MOAA members — made a \$50,000 bequest to each charity, each charity would ultimately receive \$17.5 million from those 350 MOAA members.

Your MOAA charities are doing amazing work. As you review their annual reports, consider supporting their work with a donation today. Information about where and how to donate is shown in each report, or you can visit www.moaa.org/donate.

Thank you for your continuing support of the MOAA Foundation and the MOAA Scholarship Fund.

A handwritten signature in black ink that reads "Dana T. Atkins". The signature is written in a cursive, flowing style.

Couple Honor the Past and Future

On his first day as a young Army officer at Fort Bliss in El Paso, Texas, Joseph A. Simonelli Jr. encountered a teacher helping her friend move a couch, and he offered his assistance.

Thus began 32 years of helping together for teacher Bettye Marie and Colonel Joe, as the retired officer is now known.

Since those early days at Fort Bliss, the Simonellis have developed a deep commitment to assisting veterans, military families, and organizations like MOAA. Retired from 30 years in their respective military and teaching careers, they have never stopped serving.

Their dedication includes establishing a MOAA Designated Scholarship to honor Bettye Marie's late parents and being silver-level Heritage Society donors to the MOAA Foundation, which provides programs and services to servicemembers and veterans and their families.

These donations, the Simonellis say, allow them to honor the past while providing for the future. The Violet and Paul Dickerson Designated Scholarship, for example, helps students from military families pursue degrees in educational fields. The Simonellis' \$25,000 already has provided three scholarships to future teachers, a continuation of a family legacy of education. Bettye Marie's mother, Violet Dickerson, devoted her life to teaching,



Bettye Marie and Col. Joseph A. Simonelli Jr., USA (Ret), have established a MOAA Designated Scholarship and are silver-level Heritage Society donors to the MOAA Foundation.

and her father, Paul Dickerson, became a teacher after his retirement as a lieutenant colonel from the Army.

The scholarship also lets the couple show their gratitude. "We're honoring the legacy of Bettye Marie's parents and what they meant to us," Joe says.

The scholarship is fitting in another way, too. Bettye Marie's mother was the one who introduced Joe to MOAA. During a visit, a discussion unfolded about active duty military being involved on a MOAA committee. "My mother-in-law leaned over to me and said, 'Joe, you can do this,'" Simonelli says.

That led to Joe serving two years on MOAA's Active Duty, Guard and Reserve Advisory Committee to the board of directors, followed by six years as MOAA's first active duty, active component board member.

Military life for the Simonellis

included 17 moves, with Joe in Army leadership positions, from garrison commander (mayor) of Fort Bliss and director of house affairs for the secretary of defense to chief of staff of Arlington National Cemetery. He is also a veteran of the Gulf and Iraq wars. Bettye Marie chuckles when she says she taught in whatever grade level needed each time they relocated. She also served as a liaison between the military and schools.

The couple now live in northern Virginia, and Joe works as vice president for client engagement, community relations, and government affairs for Warrior Centric Health Care, LLC.

And they continue lending a hand together, as they did 32 years ago in El Paso. "We've always wanted to be available to individuals," Joe says. "We've all been there." ■■■

— *By Judy Christie*

LEADERSHIP CIRCLE

MOAA Charities Annual Report

Never Stop Serving Leadership Circle

The Never Stop Serving Leadership Circle recognizes individual, council, and chapter contributors who have made combined, non-bequest donations, over any time period, totaling at least \$1,000 to both MOAA charities — the MOAA Scholarship Fund and the MOAA Foundation — and who have donated at least \$500 to each charity.



\$25,000
or more



\$10,000 to
\$24,999



\$5,000 to
\$9,999



\$1,000 to
\$4,999

PLATINUM

Platinum circle members have contributed a combined total of \$25,000 or more.

- Ark-La-Tex (La.) Chapter
- Lt Gen Dana T. Atkins, USAF (Ret), and Laura Atkins
- Fort Rucker (Ala.) Chapter
- CAPT Robert G. Fuller Jr., USN (Ret)
- COL Arville L. Hickerson, USA (Ret), and Betty Hickerson
- Middle Tennessee Chapter
- Gen Charles "Tony" Robertson, USAF (Ret), and Brenda E. Robertson
- VADM Norbert R. Ryan Jr., USN (Ret), and Dr. Judy Ryan
- COL Joseph A. Simonelli Jr., USA (Ret), and Bettye Marie Simonelli
- CAPT Peter B. Welch, USN (Ret)

GOLD

Gold circle members have contributed a combined total between \$10,000 and \$24,999.

- Anonymous
- VADM Michael L. Cowan, USN (Ret)
- Maj Gen Joseph G. Lynch, USAF (Ret), and Patricia G. Lynch
- Maj Gen R.C. Marr, USAF (Ret), and Sherry Marr
- Lt Col Edward L. Marvin, USAF (Ret), and Ruby Y. Marvin
- Col Jim W. O'Brien, USAF (Ret), and Noriko O'Brien
- CDR Donald D. Swain, USN (Ret)

SILVER

Silver circle members have contributed a combined total between \$5,000 and \$9,999.

- Anonymous
- Col Robert G. Certain, USAFR (Ret), and Robbie L. Certain
- Col Gary E. Clark, USAF (Ret), and Michele Z. Clark
- COL Gerald L. Crews, USA (Ret), and Andrea Crews
- Col Dan Donovan, USAF (Ret), and Diane S. Fulton
- Florida Council of Chapters of the MOAA Inc.
- Col Carol L. Hattrup, USAF (Ret)
- LTC Harvey R. Haynes, USA (Ret)
- ADM Jerome L. Johnson, USN (Ret)
- RADM Daniel B. Lestage, USN (Ret), and Helen N. Lestage
- RADM Martin W. Leukhardt, USN (Ret), and Miloslava K. Leukhardt
- Col Charles L. Martin Jr., USAF (Ret), and Caroline M. Martin
- Maj Gen Kay C. McClain, USAF (Ret)
- Col John C. McCoy, USAF (Ret)
- CDR Gary V. Meinert, USPHS (Ret)
- Lt Gen George D. Miller, USAF (Ret), and Barbara A. Miller
- COL David L. Patton, USA (Ret)
- Maj Howard J. Pfeuffer, USAF (Ret), and Cuc T. Pfeuffer
- LTG Randall L. Rigby, USA (Ret), and Carol A. Rigby
- LTG Michael D. Rochelle, USA (Ret)
- COL Michael J. Rogers, USA (Ret)
- CAPT Charles N. Starnes, USN (Ret), and Susie Starnes
- GEN John H. Tilelli Jr., USA (Ret), and Valerie Tilelli
- CDR John R. Toler, USN (Ret)
- Lt Col Robert L. Trimpl, USAF (Ret)
- Col Michael R. Turner, USAF (Ret)
- Maj John T. Whitman, USAF (Ret), and Suzanne Whitman

BRONZE

Bronze circle members have contributed a combined total between \$1,000 and \$4,999.

- Anonymous
- Lt Col Virginia A. Alloway, NC, USAF (Ret)
- LTC Lawrence Applebaum, USA (Ret)
- Col Paul W. Arcari, USAF (Ret), and M. Teresa Arcari
- Maj Norman L. Bessette, USAF (Ret), and Janet G. Bessette
- RADM Richard A. Buchanan, USN (Ret), and Amy Buchanan
- Col David L. Burney, USAF (Ret)
- CAPT James Carman, USN (Ret), and Dianne Carman
- Central Virginia Chapter
- Brig Gen Paul G. Cohen, USAF (Ret), and Arlene S. Cohen
- CDR Robert T. Douville, USCG (Ret), and Joan J. Douville
- Brig Gen John L. Finan, USAF (Ret), and Diane Finan
- Ft George G Meade (Md.) Chapter
- CAPT Clinton M. Furuya, USN (Ret)
- Dora M. Grevelt
- Capt Richard H.W. Grunwald, USMC (Ret)
- Joyce N. Harte
- RADM Larry L. Hereth, USCG (Ret)
- Lt Col Franklin G. Hill, USAF (Ret)
- COL Kelly F. Hilland, USAR, and Michael Hilland
- Maj Norwood E. Johnson, USAF (Ret)
- CDR Kevin J. Keilty, USN (Ret), and Elizabeth Keilty
- MAJ Raymond C. Kruger, USA (Ret)
- CDR Patrick J. Kusiak, USN (Ret)
- MG Robert G. Lynn, USA (Ret), and Janet M. Lynn
- COL Ted R. Maddry, USA (Ret)
- MG William H. McCoy Jr., USA
- Maj Richard J. Morton, USAF (Ret)
- CAPT David H. Peterson, NOAA (Ret), and Kathleen M. Peterson
- Col Antonio T. Pimentel, USAF (Ret), and Jill C. Pimentel
- Lt Col Sue Pollman, USAF (Ret)
- COL Barbara Ramsey, USA (Ret), and MAJ Jim Ramsey, USA (Ret)
- CAPT Leonard J. Sapera, USN (Ret), and Eileen W. Sapera
- CDR Mark K. Seglem, USN (Ret), and Anne E. Seglem
- CDR Clinton H. Smoke Jr., USCG (Ret)
- RADM Roy D. Snyder Jr., USN (Ret)
- LCDR Robert J. Sommer Jr., USN (Ret)
- LCDR Samuel W. Staples, USN (Ret), and Gertrude A. Staples
- COL James R. Steverson, USA (Ret)
- CAPT Gordan E. Van Hook, USN (Ret)
- LTC Suzanne Walker, USA (Ret), and MAJ Thomas L. Walker, USA (Ret)
- LTC William D. Wolfinger, USA (Ret), and Linda A. Wolfinger
- Col Cherie Zadlo, USAF (Ret), and Richard Pullen



AMANDA BAINTON
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MOAA Foundation
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Thank you for making 2018 a remarkable year for the MOAA Foundation. As a young 501(c)(3), we know these initial years will provide us with ample learning opportunities, growing pains, and, most important, feel-good moments that make it all worth it.

Like most years, 2018 presented challenges for those who are serving, or have served, and their families. Because of you, however, our foundation efforts have helped thousands of families face these challenges, armed with the information, tools, and resources needed to make educated decisions. Without you, these programs and services would not exist.

Here are just a few ways your contributions made a difference in 2018:

- Your donations enabled us to provide more than 100,000 servicemembers and veterans and their families with important resources, professional development, and financial education services.
- You made it easier for others to understand who we are and what we do. We heard you loud and clear: Our former name, the MOAA Military Family Initiative, was not only a mouthful, but confusing. We needed something simple and self-explanatory, so we changed our name to the MOAA Foundation.
- You helped increase individual giving to the MOAA Foundation by 79 percent. Unrestricted gifts are critical to the health and survival of our foundation and the programs it funds. Gifts large and small are valued more than you know. Thank you for your generosity and for spreading the word to others!
- You empowered your peers to get involved and give back in their local communities through the Community Outreach grant program. Thanks to you, we were able to provide 19 MOAA chapters with grants totaling \$75,000 in support of charity work needed in their local communities across the country.
- You enabled us to provide professional development support at six installations around the world and digitally for military spouses, who face a 24-percent unemployment rate. As a direct result of one of our events, President Donald Trump signed an executive order to help streamline the government hiring process for spouses.

While we made major strides, we know there is a lot more that needs to be done. If we've learned anything so far, it's that there's an abundance of possibilities regarding what we can do to support military and veteran families. The unfortunate reality, however, is that we don't have an abundance of resources to make it all happen — yet.

Thank you for all you do and for making 2018 our best year yet. I look forward to working alongside you in 2019 to make a difference for this community. The best is yet to come!

A handwritten signature in black ink that reads "Amanda Bainton". The script is fluid and cursive.

MISSION

The MOAA Foundation, a 501(c)(3) charitable subsidiary foundation of MOAA, creates, enhances, expands or supports high-impact, proven-successful MOAA national, council, and chapter programs and services helping the nation's uniformed servicemembers and veterans of all ranks, and their families, maintain a quality of life reflective of their selfless service to America. The MOAA Foundation funds these programs and services through philanthropic contributions from the American people and organizations that support our mission.

MOAA CORPORATE COUNCIL

The MOAA Corporate Council constitutes the corporate and organizational arm of the MOAA Heritage Society and provides year-round brand recognition to corporations and organizations making significant annual contributions in support of MOAA Foundation-funded programs. Visit www.moaa.org/foundation to learn more. *Founding member of the MOAA Heritage Society

ADVOCATES (\$50,000+)

- Democracy Fund
- Express Scripts*
- PenFed*
- PenFed Foundation*
- Mercer*
- USAA*

SUPPORTERS (\$25,000-\$49,999)

- Goldman, Sachs & Co.*

FRIENDS (\$10,000-\$24,999)

- Clune Construction
- Humana
- Quad Graphics*

MOAA HERITAGE SOCIETY

The MOAA Heritage Society represents the highest MOAA Foundation contributor giving level and offers year-round recognition to a special group of MOAA Life Members, councils and chapters, and other individuals demonstrating extraordinary, multi-year support of MOAA Foundation-funded programs. Society members receive a distinctive pin and special recognition at all MOAA events. Visit www.moaa.org/society to learn more. *Founding member

PLATINUM

Individual: \$10,000 a year for five years; chapter or council: \$5,000 a year for five years

- COL Patricia A. Turner Dupuis, USA (Ret), and COL Donald R. Dupuis, USA (Ret), in memory of LCDR Donald A. Turner, USN*
- COL Arville L. Hickerson, USA (Ret)*

GOLD

Individual: \$5,000 a year for five years; chapter or council: \$2,500 a year for five years

- Lt Gen Dana T. Atkins, USAF (Ret), and Laura Atkins*
- Professor William S. Benninghoff*
- Gen Charles "Tony" Robertson, USAF (Ret), and Brenda E. Robertson*
- VADM Norbert R. Ryan Jr., USN (Ret), and Dr. Judy Ryan*

SILVER

Individual: \$1,000 a year for five years; chapter or council: \$500 a year for five years

- Ark-La-Tex (La.) Chapter*
- Austin (Texas) Military Officers Association

of America*

- CAPT Henry Vaughan Belcher, USPHS (Ret)
- Col Paul A. Bergerot and Mrs. Bergerot
- LTC Travis L. Brann, USA (Ret), and Margaret L. Brann*
- RADM Richard A. Buchanan, USN (Ret), and Amy Buchanan
- Lt Col William F. Bussman, USAF (Ret), and Karen D. Bussman*
- Lt Col James D. Carson, USAF (Ret), and Marty Carson*
- Col David R. Casteel, USAF (Ret), and Marilyn S. Casteel*
- Central Virginia Chapter
- Col Robert G. Certain, USAFR (Ret), and Robbie L. Certain*
- Regina D. Chavis, in memory of Capt James C. Chavis II
- Col Gary E. Clark, USAF (Ret), and Michele Z. Clark*
- CPT Mark Comstock, USA*
- Michele Vonnegut Costello*
- COL Gerald L. Crews, USA (Ret), and Andrea Crews*
- LTC Juan M. Crockett, USA, and Dr. Rochelle L. Crockett*
- Col Maureen Cunningham, USAF (Ret), and Lt Col Ronald C. Cunningham, USAF (Ret)*
- CAPT Theodore L. Daywalt, USN (Ret), and Belinda Daywalt*
- Maj Chad Dean, USMC (Ret), and Valerie Dean*
- Col Dan Donovan, USAF (Ret), and Diane S. Fulton
- ADM Walter F. Doran, USN (Ret), and Virginia B. Doran*
- LTG John A. Dubia, USA (Ret), and Maureen V. Dubia*
- COL Dale F. Ellenburg, USA (Ret), and Mary Ellen Ellenburg*
- Alan English and Janice Rowley
- LTC Charles H. Ertell Jr., USA (Ret), and Irene E. Ertell*
- CAPT Alan B. Flanagan, USN (Ret)*
- Florida Council of Chapters*
- 1st Lt John J. Glenn, Jr., USMC (Ret), and Bettye Glenn
- COL Jeri I. Graham, USA (Ret), and COL Edward D. Baisden, USA (Ret)
- Col Carol L. Hatstrup, USAF (Ret)*
- Val P. Hawkins*
- Lt Col Gerald W. Haynes, USAF (Ret), and Judy P. Haynes*
- LTC Harvey R. Haynes, USA (Ret)
- RADM Jesse J. Hernandez, USN (Ret), and Margaret S. Hernandez*
- ADM Jerome L. Johnson, USN (Ret)*
- Col Neil K. Kanno, USAF (Ret), and Faith Kanno*
- COL Joseph A. Kurata, USA (Ret)
- CAPT Robert E. LaGassa, USN (Ret)*
- LTC Leo A. Le Bel, USA (Ret), and Theresa B. Le Bel*
- Lee Coast (Fla.) Chapter*
- RADM Martin W. Leukhardt, USN (Ret), and Miloslava K. Leukhardt*
- Maj Gen Joseph G. Lynch, USAF (Ret), and Patricia G. Lynch*

- CDR Rex A. Maddox, USN (Ret), and Patricia A. Maddox*
- Maj Gen R.C. Marr, USAF (Ret), and Sherry Marr*
- Lt Col Edward L. Marvin, USAF (Ret), and Ruby Y. Marvin*
- CDR Thomas D. Mathews, USN (Ret), and Sue S. Mathews*
- Col Mary J. Mayer, USAF (Ret)
- Maj Gen Kay C. McClain, USAF (Ret)*
- Col John C. McCoy, USAF (Ret)*
- RADM Thomas J. McGinnis, USPHS (Ret), and Linda Dubroof McGinnis, J.D.*
- Col Daniel F. Merry, USAF (Ret), and Teresa Merry
- Lt Gen George D. Miller, USAF (Ret), and Barbara A. Miller*
- RADM Edward Nelson Jr., USCG (Ret), and Joyce L. Nelson*
- Col Robert W. Norman, USAF (Ret), and Nancy R. Norman*
- Col James W. O'Brien, USAF (Ret), and Noriko O'Brien*
- CDR Earl L. Oliver, USN (Ret), and Claire E. Oliver*
- LTC Lawrence D. Petrash, USA (Ret), and Paula A. Petrash
- Maj Howard J. Pfeuffer, USAF (Ret), and Cuc T. Pfeuffer*
- Katherine E. Ponds*
- COL Michael J. Rogers, USA (Ret)*
- CAPT Timothy G. Schaefer, USN (Ret), and Denise Schaefer*
- Col Charles C. Scheuermann, USAFR (Ret)
- GEN Walter L. Sharp and Joanne Sharp
- COL Joseph A. Simonelli Jr., USA (Ret), and Bettye Marie Simonelli*
- CAPT Brian T. Smith, USN (Ret), and Lisa M. Ziehmman*
- CAPT Charles N. Starnes, USN (Ret), and Susie Starnes*
- COL James A. Thomas III, USA (Ret), and Prince Anna Thomas
- Col Donald F. Thompson, USAF (Ret), and Miriam E. Thompson
- GEN John H. Tillelli Jr., USA (Ret), and Valerie Tillelli*
- Col Michael R. Turner, USAF (Ret)*
- Col Charles B. van Pelt, USAF (Ret)*
- LCDR Larry O. Walker, USN (Ret), and J. Gayle Walker*
- CDR Burton "Buzz" J. Waltman, USN (Ret), and Jane C. Waltman*
- CAPT Peter B. Welch, USN (Ret)*

BRONZE

Individual: \$250 a year for five years; chapter or council: \$125 a year for five years

- COL Roy H. Adams Jr., USA (Ret), Ph.D.*
- Alamo (Texas) Chapter
- Lt Col Virginia A. Alloway, NC, USAF (Ret)*
- LTC Arthur Thomas Alm, USA (Ret)*
- LCDR Eric D. Anderson, USN (Ret)
- Col James Anderson, USAF (Ret)*
- Col John F. Andrews, USAF (Ret), and Vera Andrews*
- Anonymous

- Col Paul W. Arcari, USAF (Ret), and M. Teresa Arcari*
- LTC Gregory A. Bacon, USA (Ret)*
- RADM Jonathan W. Bailey, NOAA (Ret), and Cynthia Bailey
- CDR Donald K. Bently, USN (Ret)*
- Maj Norman L. Bessette, USAF (Ret), and Janet G. Bessette*
- COL Joseph E. Boling, USA (Ret), and Helen-Louise Boling*
- MAJ Michael Bollinger, USA (Ret), and Dr. Lily Bollinger*
- Bradenton (Fla.) Chapter*
- LTC Gary M. Bratt, USA (Ret), and Shirley A. Bratt*
- Annie S. Brock*
- Lt Col Jeffrey A. Brock, USAF (Ret)*
- Col Michael D. Broderick, USAF (Ret), and Jane C. Broderick*
- Lt Col Christopher L. Burnham, USAF (Ret), and Debra C. Burnham*
- Capt Franklin L. Bush, USAF (Ret)*
- CAPT James Carman, USN (Ret), and Dianne Carman*
- BG Joseph C. Carter, USA (Ret), and Rae M. Carter
- CDR John J. Chernoski, USN (Ret), and Mary A. Chernoski*
- LTC Matthew G. Clark, USA, and Katie Clark*
- 1LT Richard W. Coffland, USA (Ret), and JoAnn M. Coffland*
- Brig Gen Paul G. Cohen, USAF (Ret), and Arlene S. Cohen*
- Lt Col James M. Conner, USAF (Ret), and Dottie Conner*
- CAPT Dennis M. Corrigan, USN (Ret)*
- VADM Michael L. Cowan, USN (Ret)*
- Col Richard R. Crawford, USMC (Ret), and Martha Crawford*
- June Crouch
- Capt William Sims Curry, USAF (Ret), and Kirsten Curry
- Col John W. Dalton, USAF (Ret), and Billie J. Dalton*
- COL Charles T. Davis, USA (Ret), and Priscilla Davis*
- CAPT Michael J. DeHaemer, USN (Ret), and Judith DeHaemer*
- Col Steven L. dePyssler, USAF (Ret), and Gloria dePyssler*
- COL Dwight L. Dinkla, USA (Ret), and Brenda E. Dinkla*
- CDR Robert T. Douville, USCG (Ret), and Joan J. Douville*
- Douglas E. Dubois*
- LTC Allen A. Dubuc, USA (Ret), and Janet Dubuc
- Maj Gen Charles J. Dunlap, USAF (Ret), and Joy Dunlap
- East Iowa Chapter*
- Hollace Eaton-Bradfield
- COL Glenn T. Fasanella, USA (Ret), and Angela K. Fasanella*
- Lt Col Victor A. Ferrante, USAF (Ret), and Jeanne W. Ferrante
- CAPT Edward C. Ferriter, USN (Ret), and Patricia Ferriter*
- Brig Gen John L. Finan, USAF (Ret), and Diane Finan*
- COL Paul M. Fleenor, USA (Ret), and Ann W. Fleenor
- Fort Rucker (Ala.) Chapter*
- Ft George G Meade (Md.) Chapter*
- RADM S. Frank Gallo, USN (Ret), and JoAnne Gallo*
- MAJ John W. Gareis, USA (Ret), and Delores A. Gareis
- LTC John O.L. Gilliland, USA (Ret), and Sandra E. Gilliland*
- CW2 Ricky C. Godbolt, USA (Ret), and Barbara Godbolt*
- Robert J. Grasmuck and Dr. Carolyn B. Radding, VMD*
- Greater Baton Rouge (La.) Area MOAA
- LTC Ginni Guiton, USA (Ret)
- COL C. Richard Guiton, USA (Ret)
- LTC Lee J. Harrer, USA (Ret)
- CW4 Craig M. Harris, USA (Ret), and Eleanor Harris*
- Joyce Harte*
- CAPT Alvin D. Hersh, USCGR (Ret), and Irma J. Hersh*
- RADM Clare Helminiak, USPHS (Ret), and CAPT Gene E. Carnicom, USPHS (Ret)
- COL Kelly F. Hilland, USAR, and Michael Hilland*
- CDR Thomas J. Hoskins, USN (Ret), and Diane H. Hoskins*
- LTC Kenneth I. Hunt, USA (Ret), and Susan M. Hunt*
- Indianhead (Wis.) Chapter*
- Lt Col Deborah L. Johnston, USAF (Ret)*
- COL Harvey T. Kaplan, USA (Ret), and Naomi M. Kaplan*
- CDR Kevin J. Keilty, USN (Ret), and Elizabeth Keilty*
- LT Albert D. Kirwan, USN*
- Col Peter K. Kloeber, USAF (Ret), and Lt Col Joyce Kloeber
- RADM Leland S. Kollmorgen, USN (Ret), and Dorothy W. Kollmorgen
- CDR Patrick J. Kusiak, USN (Ret)*
- Col Lee F. Lange, USMC (Ret), and Janet Lange*
- LTC Ronald V. Lange, USA (Ret), and Jo Anne Lange
- MG Willard Latham, USA (Ret)
- Col David L. Lay, USAF (Ret), and Jeanette M. Lay*
- Mary Lenerville*
- RADM Daniel B. Lestage, USN (Ret), and Helen N. Lestage*
- Louisiana Council of Chapters*
- MG Robert G. Lynn, USA (Ret), and Janet M. Lynn*
- Col Charles L. Martin Jr., USAF (Ret), and Caroline M. Martin*
- Maryland Military Officers Association of America*
- COL Michael N. Mattia, USA (Ret), and Maria M.C. Mattia*
- Mayport (Fla.) Chapter MOAA Inc.*
- CAPT C. Andrew McCawley, USN (Ret)
- Maj F. Jack McCombs, USAF (Ret), in memory of Deanna Whitaker and Alan Foster
- DIR M. Carlene McIntyre, USPHS (Ret), and



**LT. COL. CHARLIE PELHAM,
USA (RET)**

Lt. Col. Charlie Pelham, USA (Ret), is the director of technology development within the Sensor Processing and Exploitation Product Line of BAE Systems Inc.'s FAST Labs. He served in the Army as an engineering officer with more than 24 years of service.

'[MOAA's] Military and Veterans Networking Forum definitely had a major impact to my transition from the military. It allowed me to explore careers as well as meet professionals [in fields] that I may not have considered during my transition. The value of this forum for transitioning military professionals is priceless, and I highly recommend it to my network and friends.'

Lt. Col. Charlie Pelham, USA (Ret)

WHAT YOUR DOLLARS SUPPORT

MOAA Foundation-funded programs serve the entire uniformed service community. We focus on four areas of vital military family and veteran need, aligned with areas of particular MOAA national and local expertise:

- Career transition
- Professional education outreach
- Military spouse professional development
- Community outreach

- John R. McIntyre*
- CAPT William M. Mickle, USN (Ret)
- Middle Tennessee Chapter
- Military Officers Association of Sarasota (Fla.) Inc.*
- Gertrude J. Miller
- Mrs. E. James Mills-Price
- Montgomery County (Md.) Chapter*
- COL Michael D. Moser, USA (Ret), and Suzanne Moser
- COL Ira G. Moss, USA (Ret), and Frances C. Moss
- COL James A. Mundt, USA (Ret)*
- CAPT Jim Murphy, USN (Ret), and Cynthia Murphy
- Lt Col Thomas D. Neff, USAF (Ret)*
- COL Robert F. Norton, USA (Ret)*
- Jane T. Overton
- CAPT David H. Peterson, NOAA (Ret), and Kathleen M. Peterson*
- COL Merle J. Peterson, USA (Ret), and Betty L. Peterson
- Col Antonio T. Pimentel, USAF (Ret), and Jill C. Pimentel*
- LCDR Clark B. Pollock, USN (Ret), and Janis M. Pollock*
- Brig Gen David E. Price, USAF (Ret), and Paula R. Price*
- COL Barbara Ramsey, USA (Ret), and MAJ Jim Ramsey, USA (Ret)*
- Col Robert J. Rehwaldt Sr. and Miriam Rehwaldt
- BG Velma Richardson, USA (Ret), and Billie Richardson*
- LTG Randall L. Rigby, USA (Ret), and Carol A. Rigby*
- Lt Col Rojan Robotham, USAF, and Kwesi Robotham
- CWO4 Charles R. Rogers, USA (Ret)
- LTC Laroy M. Rushing, USA (Ret), and Carol N. Rushing*
- Col George J. Sakaldasis, USAF (Ret), and Maj JoAnn Sakaldasis, USAF (Ret)
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- CAPT Leonard J. Saper, USN (Ret), and Eileen W. Saper*
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2018 ANNUAL CAMPAIGN

The MOAA Foundation would like to offer a very special thanks to the many individual donors who contributed to last year's annual campaign by donating in support of the foundation's military family programs. We received \$150,000 in individual donations in 2018, a 79-percent increase in individual giving year-over-year. That's a truly significant achievement, and we are deeply appreciative of your support.

MOAA FOUNDATION ANNUAL GIVING CAMPAIGN

The MOAA Foundation annual giving campaign challenges all MOAA members to donate at least \$50 to the MOAA Foundation in 2019. Our goal is 3,000 contributions. Visit www.moaa.org/foundation to learn more.

HOW YOU CAN CONTRIBUTE

If you would like to contribute to the MOAA Foundation, visit www.moaa.org/foundation and contribute online (preferred) or by mail to the MOAA Foundation, P.O. Box 1555, Merrifield, VA 22116-9942.



FORMER CAPT. MEREDITH REED, USAF

Meredith Reed was on MOAA's Currently Serving Spouse Advisory Council from 2015-17. She now works as a real estate agent in Park City, Utah. As a certified project management professional, she has provided project management expertise to the Army Casualty and Mortuary Affairs, the Army Wounded Warrior Program, and the DoD Yellow Ribbon Reintegration Program.

'Attending the MOAA networking event at the Air and Space Museum ... was a great opportunity to chat with employers and organizations, and just as importantly, to connect with the other attendees. I was fortunate to have meaningful conversations with some of the organizations that were looking to hire, and I made new friends. Mission accomplished on growing my network!'

Former Capt. Meredith Reed, USAF

FOUNDATION 2018

MOAA Charities Annual Report

2018 Sources and Uses of the MOAA Foundation

SOURCES	2018	2017
Individual Donations (one-time gifts)	\$150,658	\$91,259
MOAA Heritage Society (new memberships)	\$32,666	\$21,509
Organizational Gifts (unrestricted)	\$438,618*	\$100,715
Restricted Gifts (program restricted)	\$436,602	\$540,620
Total Revenue	\$684,109**	\$754,103

*Includes one-time infusion of \$374,435 due to program realignment. Without this adjustment, total Organizational Gifts would be \$64,183. Total revenue reflects this lower amount.

**Two corporate donations totaling \$163,000 scheduled to be received in 2018 were deferred until early 2019 by the donors. Scheduled receipt of these donations would have resulted in 2018 revenue of \$847,109 against a 2018 revenue target of \$823,750.

USES

Career Transition:

- Presented MOAA Military and Veteran Networking Forum: 750 registrants; more than 500 attendees (military, veteran, spouse job seekers)
- Conducted 86 "Marketing Yourself" on-installation career transition seminars for 1,531 attendees
- Conducted three virtual career fairs for 373 military, veteran, and spouse job seekers

Professional Education Outreach:

- Completed 64 military installation visits to deliver the award-winning MOAA financial education and blended retirement system content to over 7,000 active duty military personnel, veterans, and their families

Military Spouse Professional Development:

- Conducted six all-day military spouse symposia at military installations and supported more than 4,000 spouses with professional development information and resources
- Recognized by the American Society of Association Executives with a "Power of A" Silver Award
- Nominated by the U.S. Chamber of Commerce for the Military Spouse Employment and Mentoring Award
- Conducted a nationwide Military Family Absentee Voting Survey through a grant from the Democracy Fund and engaged 3,000 active duty families to participate
- Conducted a military family absentee voter outreach campaign resulting in 3,279 downloads of MOAA's white paper to inform these families about absentee voting

Community Outreach:

- Tripled the size of the Community Outreach grant program, increasing applications from 9 to 29, approved applications from 6 to 19, and disbursements from \$25,000 to \$75,000

2018 COMMUNITY OUTREACH GRANTS

Southeast Wisconsin	\$4,000
Charlotte-Metrolina, N.C.	\$5,000
Western Montana	\$5,000
S. Central Fla.	\$5,000
Greater Dallas*	\$2,500
Greater Gransbury, Texas	\$5,000
Southern Maine	\$5,000
Southwest Va.	\$5,000
St.Petersburg Area, Fla.	\$3,750
Coronado, Ariz.	\$2,250
Luke, Ariz.	\$3,750
North Texas*	\$2,500
Indian River County, Fla.	\$3,750
Ohio Western Reserve	\$3,750
Treasure Coast, Fla.	\$3,750
El Paso, Texas	\$3,750
Grand Strand, S.C.	\$3,750
Heart of America, Kan.	\$3,750
Northwest Florida	\$3,000

*Duplicate programs. Each chapter awarded half of maximum amount.



COL. LARRY ZINSER, USMC (RET), LEFT

In 2018, the Charlotte-Metrolina (N.C.) Chapter received a Community Outreach grant from the MOAA Foundation to provide professional development and career readiness services to veterans to help them better transition to civilian life. In partnership with Veterans Bridge Home, a non-profit providing wraparound services for military families, chapter members have acted as mentors to veterans.

'As a current member of a 'retired' community, I am exposed to my own generation only ... a bunch of old people. The mentoring program ... renews my confidence in the patriotism, courage, and self-sacrifice of today's young men and women. My mentee's ambition, family values, and high aspirations ... have renewed my pride in our armed forces.'

Col. Larry Zinser, USMC (Ret)

SCHOLARSHIP FUND 2018

MOAA Charities Annual Report



ANDREA RAND
Executive Director,
MOAA Scholarship Fund
andrear@moaa.org
(800) 234-6622, ext. 169

I am pleased to report 2018 was a banner year for the MOAA Scholarship Fund and Educational Assistance programs. The MOAA Scholarship Fund received \$1 million in donations from individuals, chapters and councils, foundations, and corporations. The fund also received nearly \$12 million in bequests. This support will go a long way in helping our wonderful military families.

The Educational Assistance program completed a bottom-up review of every aspect of operations. This included the application process, the renewal process, document retention, financial controls, and communication. We looked at both the broad, outward-facing impression of our operations and the focus on individual students. Brandon Hinke, development operations manager, worked with our IT, Finance, and Communications departments to improve the student experience, ensuring transparency, consistency, and accuracy across all phases. In 2019, we will continue finding efficiencies as we work to provide a portal for graduates so they can make payments, obtain loan balance information, change addresses and other contact information, etcetera through a secure online platform.

The success of these programs is your success. Through donations large and small, you provided more than 1,300 families with \$8.2 million in financial assistance for the 2018-19 school year. Whether it's a chapter 50/50 drawing, a memorial to a loved one, a recurring donation from the Defense Finance and Accounting Service retirement income, a gift of a qualified minimum distribution, or the myriad of other ways you give, you are making a difference. We are grateful for your MOAA membership and your financial support of our programs. We are proud of this best-in-class program, and we will continue to ensure its success.

Andrea Rand

A Legacy of Dedication

When Capt. Walter L. Goldenrath retired from the Navy in 1975, the surgeon general of the Navy presented him with the Legion of Merit and Meritorious Service Award, and the Navy recognized him and his wife, Sylvia, for their contributions during his career. Among the projects Goldenrath contributed to during his time in the military, and in a post-military career at NASA, were research and development of aircraft ejection seat systems and flight suits and associated equipment, and the health impacts of low-gravity environments.

In addition to the legacy of a lifelong commitment to aeronautical health and safety, he and his wife will be remembered for years to come by generations of military children — 47 in the 2018-19 academic year, four of whom are profiled below — who receive grants funded by the Goldenraths' generosity.

Goldenrath was a naval aviator in World War II, flying the Consolidated PB7Y Catalina on search-and-rescue and reconnaissance missions in the Pacific Theater. After the war, he continued to serve as a naval reservist while attending medical school at the University of California at Berkeley, and when he was recalled to duty during the Korean War, he was assigned to the Naval Medical Institute.

Following his wartime service, he returned to Berkeley, where



Timothy McWilliams, center, proudly displays a certificate indicating he has received a grant made possible by the generosity of the late Navy Capt. Walter L. Goldenrath (inset).

he taught at the medical school, pharmacy school, and dental school. He returned to active duty in 1955 and helped develop a high-altitude suit that was later worn by Project Mercury astronauts Alan Shepard and John Glenn. After his military retirement, he worked with NASA's Technology Transfer Office, seeking civilian applications of biomedical technology.

Goldenrath retired for good in 1997, and he and Sylvia lived in California until her death in 2003. In 2004, he was inducted into the Hall of Fame of the Smithsonian National Air and Space Museum. He died in October 2010 at age 92.

SCIENCE AND INDUSTRY

The Goldenraths' will specified, "Students receiving these grants ... shall be pursuing studies in the field of science," which includes the physical sciences, engineering, computer science, and all medical fields.

- Alyssa Bronson is a senior

- studying materials science and engineering at the Georgia Institute of Technology; her senior design project is designing and testing comfort coatings for throat and nasal catheters.

- Cassandra Vietas is a senior studying exercise science at Simmons University in Boston, where she captains the swimming and diving team. She plans to pursue a doctorate in physical therapy.

- Joshua Haines is in an integrated master's program at Brigham Young University in Utah and expects to graduate in 2020 with both a bachelor's and a master's in information systems.

- Timothy McWilliams is a senior studying biology at the University of Alabama at Birmingham (UAB). After graduation, he'll start medical school at UAB. ||||



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The Legacy Circle comprises donors who have chosen to include the MOAA Scholarship Fund in their estate planning.

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- Irmgard Sherman
- Ruth Ann Slovik
- Lt Col Robert L. Smith, USAF (Ret), and Diane S. Smith
- June K. Stanberry



CAROLYN AND COL. ERIC T. CHASE, USMC (RET)



After attending MOAA banquets during which founders of other Designated Scholarships were honored, Carolyn Chase and her husband, Col. Eric T. Chase, USMC (Ret), often discussed how someday they, too, would like to set up a Designated Scholarship. They realized it would be an excellent way to give back and provide opportunities for future generations.

Carolyn initially funded The Captain Oliver C. Chase Jr., USAF, and Colonel Eric T. Chase, USMC, Designated Scholarship in 2012 to honor her husband, Eric, as he retired from the Marine Corps, and his late father, Oliver, above right, who died when his plane was shot down in 1965 during an attack on Viet Cong forces.

‘The most rewarding aspect [of funding this Designated Scholarship] was the ability to honor both Eric (on the occasion of his retirement) and his father, whom Eric never knew but truly admired. We have also enjoyed hearing from the scholarship recipients! We are delighted that we are able to help them pursue their education and professional aspirations.’

Carolyn Chase

SCHOLARSHIP FUND 2018

MOAA Charities Annual Report

SOURCES AND USES OF THE MOAA SCHOLARSHIP FUND

SOURCES

Beginning Cash	317,001
Sources Over (Under) Uses	12,046,194
Conversion of Investments to Cash	<u>(10,891,413)</u>
Ending Cash	<u>1,471,782</u>

SOURCES IN EXCESS OF USES

Sources:

Contributions, Bequests, and Gift Annuities	13,259,851
Student Loan Repayments	7,246,140
Investment Income	<u>479,475</u>
Total Cash Received	<u>20,985,466</u>

Uses:

Student Loans Issued	(7,635,650)
Grants Issued	(1,010,600)
Direct Expenses	<u>(293,022)</u>
	<u>(8,939,272)</u>

Total Sources Over Uses 12,046,194

RESERVE FOR FUTURE LOANS AND GRANTS (INVESTMENTS)

Beginning Reserve for Future Loans/Grants	54,709,281
Conversion of Cash to Investments	10,891,413
Split Interest Agreements and Securities	1,539,194
Gains/Losses on Investments	<u>(3,785,990)</u>

Ending Reserve for Future Loans and Grants 63,353,898

- Dorothy S. Stanley
- CAPT Gerald W. Stanley, NOAA (Ret)
- Maria-Theresia Steeg
- RADM and Mrs. Everette D. Stumbaugh, USN (Ret)
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- Jenese White
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- Lt Col James E. Wood, USAF (Ret), and Joanne Wood
- LCDR John L. Woodward Jr., USN (Ret), and Flora Woodward
- Col Michael Ziegler, USAF (Ret), and Diane Ziegler

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The Eagle Society recognizes those who have contributed \$100,000 to \$499,999 to the MOAA Scholarship Fund, either in a single donation or over time.

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- Estate of Mikel-Helene Brown
- Estate of LTC John C. Buchanan, USA (Ret)
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- Estate of Margaret Duttweiler



JAYCEE CURETON

Jaycee Cureton is a 2018-19 Goldenrath Scholar. (For more information on grants made possible by the generosity of the late Capt. Walter L. Goldenrath, USN, see “A Legacy of Dedication,” page 70.) Jaycee attends the University of Central Florida in Orlando, where she’s majoring in biomedical sciences. She currently serves as the executive director for a student government agency, and she serves on the president’s team for the Pre-Dental Student Association. Upon graduating in December 2019, Jaycee will attend dental school and join the military.

“The Goldenrath Scholarship has allowed me to further my education by alleviating the financial burden, permitting me to focus more on my studies. I am truly grateful for those who donate their gifts to allow me to reach my dreams and become a resource for those in need.”

Jaycee Cureton

SCHOLARSHIP FUND 2018

MOAA Charities Annual Report

ABOUT THE MOAA SCHOLARSHIP FUND

The MOAA Scholarship Fund is a nonprofit, charitable organization incorporated in Virginia and declared tax-exempt by the IRS under §501(c)(3) of the Internal Revenue Code.

Its tax identification number is 54-1659039. A member of the Military Family and Veterans Service Organizations of America, it is rated "Best in America" by the Independent Charities of America.

MOAA is committed to demonstrating the highest standards of public accountability and stewardship of donors' gifts. Contact MOAA's Member Service Center, (800) 234-MOAA, to request the Scholarship Fund's most recent audited financial statements.

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COL. WILLIAM FRIPP FISON WOLLENBERG, USA (RET), AND DORIS RUTH STOCKING WOLLENBERG

Col. William Fripp Fison Wollenberg, USA (Ret), and his wife, Doris Ruth Stocking Wollenberg, married in 1957. Their duty stations included Kentucky, Wisconsin, Connecticut, Kansas, Virginia, Washington, D.C., and West Germany. William served two years in Vietnam. Doris retired in 1992 after 26 years of teaching, and William retired from active duty in 1986. He worked for Allen Corp./Singer/CAE Link Corp. as a project/office manager, while Doris embraced retirement as a time to travel to places such as the Amazon River, India, Denmark, and China, where she spent time in 2006 as an “exchange artist.” William served on MOAA’s Board of Directors from 1998–2004.

After Doris’ death in 2012, William established a Designated Scholarship in her memory.

‘I established a designated scholarship shortly after the death of my wife, who was a school teacher. She taught mostly in and around the military communities ... I would get assigned to. She thoroughly enjoyed teaching and was dedicated to it.’

Col. William Fripp Fison Wollenberg,
USA (Ret)

SCHOLARSHIP FUND 2018

MOAA Charities Annual Report

Scholarship Fund Leadership

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