

The Board of Trustees (BOT) manages the assets of the SWE Endowment Fund Inc. and the SWE Reserve Fund. The group of 8 trustees is elected by the society membership.

July 1, 2018 – June 30, 2019

BACKGROUND

SWE Endowment Fund, Inc. (SWE-EFI)

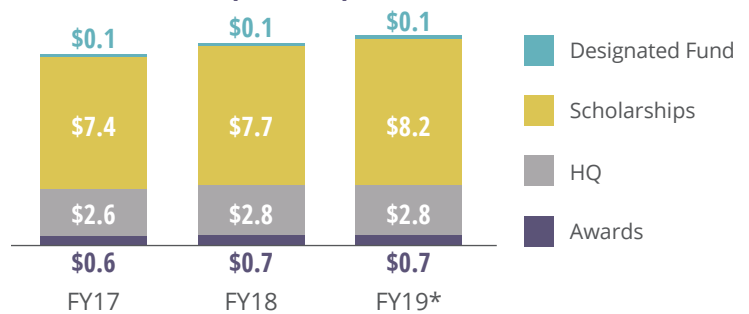
- Established in 2005 with endowments received beginning in 1956
- Funded by Life memberships, bequests and other donations
- Includes HQ, Awards, Scholarships, and Designated Funds

SWE Reserve Fund (SWE-RF)

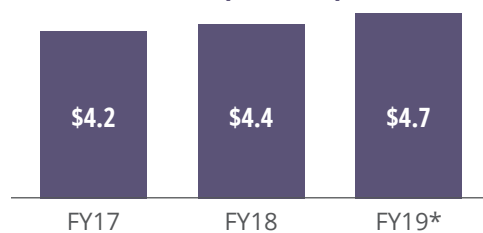
- Established in 1982 to ensure long-term financial stability
- Controlled by the SWE Board of Directors
- Amended Feb 2018 by the Senate to remove Special Projects provision
- Target balance of the Reserve Fund is a percentage of SWE's overall general operating expense balance

FUND BALANCES

SWE-EFI Assets (\$Million)



SWE-RF Assets (\$Million)



* FY19 unaudited

FY19 IMPACT In FY19, SWE EFI Provided:

\$263,850
119 Scholarships

\$110,077
General Support for SWE HQ

\$26,210
208 Awards

\$2,673
3 Designated Fund Distributions

Scholarships to be awarded in Fall 2019:

- Lois Bey Memorial
- SWE Columbia River Section
- Alice May Anderson Memorial
- SWE Quad Cities/Muscatine Section
- SWE Detroit Section: Jodie E Rewald Memorial (delayed)
- University of Minnesota Twin Cities
- Golden West Region Legacy
- Margaret (Pritch) Pritchard Memorial
- Southeast Diamond*
- Bertha Lamme Memorial*

Scholarships to be awarded in Fall 2020:

- Wolfs Family Scholarship
- Wendy Landwehr Memorial Scholarship
- Dr. Paula Marie Stenzler Legacy Scholarship for Engineering
- Roberta Marie Stinson Scholarship
- SWE Ohio State Section Scholarship

Scholarship to be awarded in Fall 2021:

- Linda Freeman Scholarship



FY20 TRUSTEES

STANDING FROM LEFT:
Paula McDonald, Dianne Beever, Ester Barbuto, Cassi Janakos, Marge Inden

SITTING FROM LEFT:
Mary Studlick, Sandra Postel, Janis Mantini

JOIN US

BOT - We Want You!

Do you have experience with investing? Are you interested in the markets? Check out our Webinar: *SWE Board of Trustees: Role and Function*

bot@swe.org