Society of Women Engineers Board of Trustees

STAKEHOLDER BRIEFING

July 1, 2019 – June 30, 2020

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.

* As of 6/22/20, The Reserve Fund is managed by the SWE Investment Committee, made up of representatives from the BOT, SWE Board of Directors, and SWE Headquarters.

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 March 2020 by the Senate to transfer fund management to Investment Committee established by BOD
- Target balance of the Reserve Fund is a percentage of SWE’s overall general operating expense balance

SWE-EFI Assets ($Million)

<table>
<thead>
<tr>
<th>FY18</th>
<th>FY19</th>
<th>FY20*</th>
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<tbody>
<tr>
<td>$7.7</td>
<td>$8.2</td>
<td>$7.8</td>
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SWE-RF Assets ($Million)

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<thead>
<tr>
<th>FY18</th>
<th>FY19</th>
<th>FY20**</th>
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<tbody>
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<td>$4.4</td>
<td>$4.7</td>
<td>$4.9</td>
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In FY20, SWE EFI Provided
- $286,996
- 119 Scholarships

$112,315
General Support for SWE HQ
- $26,210
217 Awards

$4,185
3 Designated Fund Distributions

New scholarships for 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

New scholarships for Fall 2021
- Detroit SWE 4 Life Endowed Scholarship
- SWE-OC Endowed Scholarship
- Freeman Family Scholarship
- Woon Family Scholarship

FY21 TRUSTEES

Top Row From left to right:
- Mary Studlick (Treasurer FY20-FY22)
- Sandy Postel (Chair FY19-FY21)
- Janis Mantini (Secretary FY21-FY23)
- Ester Barbuto (FY20-FY22)

Bottom Row From left to right:
- Cassi Janakos (FY19-FY21)
- Paula McDonald (FY20-FY22)
- Deb Stromberg (FY21-FY23)
- Kim O'Rourke (FY21-FY23)

Contact Us:
bot@swe.org

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

JOIN US

Society of Women Engineers