

Building a Strong Foundation

2022 IMPACT REPORT



Do Good Fest is only made possible thanks to an army of volunteers such as those seen here.

2022 WAS A YEAR OF TRANSITION

Many of us returned to public places after months at home during the pandemic. For some, this was a welcome change. To be among people again was invigorating. For others, it brought stress. In particular, we learned that anxiety among children was tragically high. The other focus of the National Life Group Foundation, ending childhood hunger, was a bigger issue than ever due to inflation. That's when we stepped in to mobilize resources to help. In some cases, we broke records doing it.



Employee volunteers hosted a back-to-school drive collecting classroom necessities that would help both teachers and students.

Our employee donation matching program, Share the Good, raised almost \$750,000 for nonprofits our teammates care about. The majority of donations happened to go to the Vermont and North Texas Foodbanks.

For the third year, we partnered with Sodexo to provide Thanksgiving meals. This time we distributed 1,320, up from 1,100 in 2021. This was more than we ever packaged, more than we planned on. Our volunteers handed meals to those who needed one, no questions asked.

Our Do Good Cupboard, the emergency resource in downtown Montpelier that National Life stocks with nonperishable food and hygiene products, was often depleted the same day it was stocked.

In October, we held our first Do Good Fest at the Levitt Pavilion in Arlington, Texas. The concert benefited Parkland Health's Pediatric Behavioral Health Program and welcome

LifeChanger of the Year grand prize winner Barbara Yarbrough to stage. The concert brought in more than \$50,000 for Parkland so they can continue to provide Dallas area children with the mental health resources they need.

Our Vermont-based Do Good Fest also did good, raising the most it ever has, \$86,000, for the UVM Central Vermont Medical Center's Branches of Hope Cancer Patient Fund. This fund provides resources including food, heating fuel, and more to those fighting cancer.

As for the general grants we give to nonprofits primarily in Vermont and Dallas, Texas, our focus continued to sharpen on ending childhood hunger and supporting children's mental health. \$1.3 million went to qualifying organizations to support the good they do in our communities. This focus allows us to maximize our impact on our core causes.

Finally, we ended the year by hosting a holiday event at Vogel Alcove, a childcare center for homeless children in Dallas, Texas. More than 60 National Life volunteers stepped in to help serve a hot holiday meal to families, children and the Vogel staff. There were balloon animals, visits with Santa and horse-drawn carriage rides. To see children playing tag and whispering in Santa's ear, as children should, filled all of us with hope. Because **when we work together, especially during times of uncertainty, we can do big things.**



Beth Rusnock

PRESIDENT AND CEO,
NATIONAL LIFE GROUP FOUNDATION

Believe in tomorrow. Do good today.

2022: The Year in Review

“National Life is a financial services company with a soul.”

– Mehran Assadi

The National Life Group Foundation has **increased its budget** by 15 percent, bringing the total to **\$2.3 million**.

210
Grant
requests.
154
Grants
approved.



2 agents were recognized with an Agent Do Good Award for their exemplary work with nonprofits.



\$65,000 donated to **16 LifeChangers and Schools** across the country.

3,000 volunteer hours of doing good in employee's communities.

\$1.3 million
DONATED



Over half supported hunger relief, including **\$100,000** each to the **Vermont Foodbank**, the **North Texas Food Bank**, and **Hunger Free Vermont**.



Nearly one third was allocated to support children's mental health including **\$35,000** to the **Family Place** and **\$15,000** to **Alliance for Children**, both in North Texas.



A holiday celebration including **300** meals to homeless children, their families and the staff at **Vogel Alcove**, a **childcare center** in Dallas.



1,320 free Thanksgiving meals safely distributed in collaboration with community partners.



SHARE THE **good**

\$714,788 pledged in 2022 to 437 nonprofits through **Share the Good**, our employee donation matching campaign.

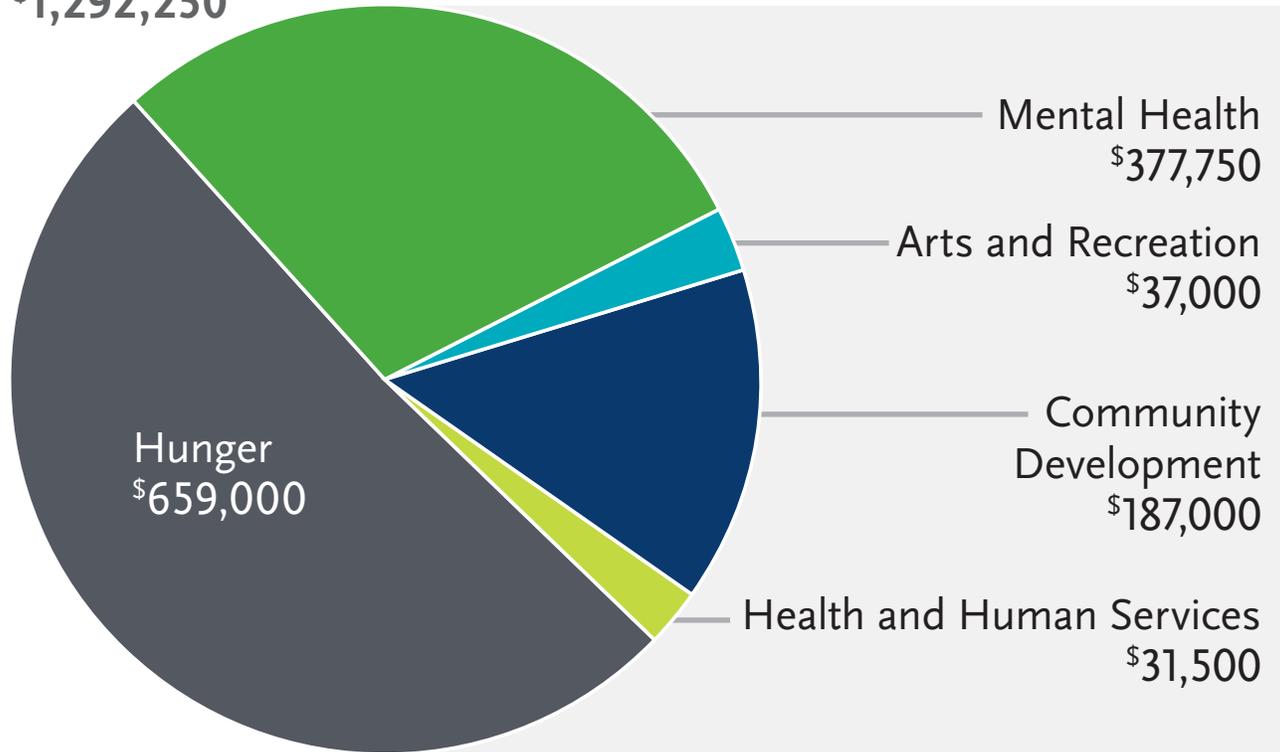
National Life Group Foundation

Do Good Fest in Arlington Texas raised **\$70,220** to **Parkland Health Pediatric Behavioral Health Program** to support Children's Mental Health.

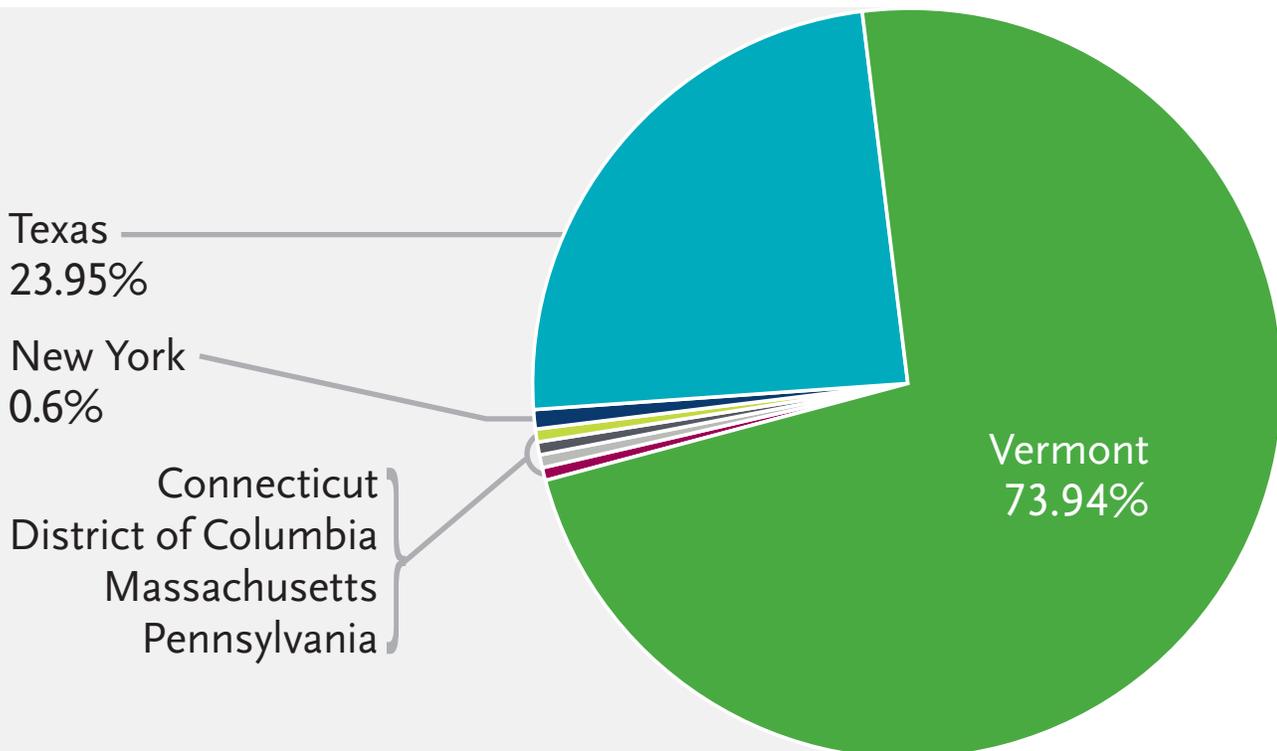


Grant Allocations by Donation

TOTAL: \$1,292,250



Distribution of Funds by Location





We funded 5 gleaning programs which provided **tens of thousands of pounds of fresh fruit and veggies** to at-risk neighbors.



Do Good Fest welcomed 6,500 concert goers and raised **\$86,000** for the **Branches of Hope cancer patient fund** at CVMC.



Our largest grant in history to Let's Grow Kids to provide **high quality, affordable child care**.



Year-round programming is now available through Camp Ta-Kum-Ta, for children with cancer.

We Build on the Connections We Make

Participate in and help fund the **Working Communities Challenge** to build strong, healthy communities.

Volunteers donated their time to VBSR, Prevent Child Abuse Vermont, the Burlington Boys & Girls Club and more.



Funded the Vermont Language Justice Project which is making **multi-lingual health messages** to refugees and immigrants.

Provided **\$180,000** over 3 years that enabled Champlain Housing Trust to meet its capital campaign goal with a focus on **BIPOC home ownership**.

Supported passage of S.100, Universal Meals bill which extended accessibility to **food for 83,534 Vermont kids**.



Made **1000+** Health Care Shares available through multiple organizations. This healthy food is provided to those at risk, benefiting them physically and mentally.



Our donation to the Vermont Foodbank helped provide **300,000 meals** for food insecure Vermonters.

Celebrating LifeChangers

The National Life Group Foundation is proud to support school employees from all fifty states and the District of Columbia with awards for doing good in their schools. These awards are split between LifeChanger of the Year finalists and their schools.

2022 Grand Prize Winner

Derrick Dixon is a Third Grade Additional Adult Assistant at Bedford Elementary School in the city of Baltimore Maryland. He was nominated by his principal Christina Connelly.

“There is no one I can think of who exemplifies the title of LifeChanger of the Year more than Mr. Derrick Durrell Dixon,” said Connelly. “To be around Mr. Dixon is to experience joy and peace. He moves through this world looking to support everyone around him while bringing a smile or laugh to their day.”

WE AT NATIONAL LIFE ARE HONORED TO RECOGNIZE AND SUPPORT THOSE MAKING AN IMPACT AND DIFFERENCE IN THEIR COMMUNITIES.

Derrick Dixon, 3rd grade adult assistant at Bedford Elementary School, Baltimore, Maryland. LifeChanger of the Year grand prize winner.



Extending the Good

With more than 40,000 National Life Group agents all over the United States, it's a natural extension to recognize the good they do in their own communities. We do this through the Agent Do Good Award.

Affiliated Agencies

Conor Boyd of Thoroughbred Advisors in Latham, N.Y., was awarded grand prize for his work with **Berkshire Farm Center and Services for Youth**. A \$7,500 donation from the National Life Group Foundation was made to Berkshire in his name.

Robert Boswell of Evolution Financial Group in Media, Pa., was runner-up for his work with **Tennis for Teal**, which promotes ovarian cancer awareness and raises money for research at the Penn Ovarian Cancer Research Center. A donation of \$1,000 was made in Boswell's name through the Foundation.

Tony Sardis of Insurance & Investment Advisory Group in New Brunswick, NJ was also a runner-up for his commitment to **SNUGS (Special Needs Undergraduate Swim Lessons)**. His nonprofit brings free, one-on-one, personalized water safety and technique clinics to financially-burdened families who have disabled children. Our Foundation donated \$1000 in his name.



CONOR BOYD



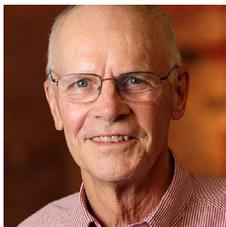
BILL LE

Independent Agencies

The grand prize went to **Bill Le**, founder of Independent Agency Alliance in Houston for raising money to help to **combat poverty in his native Vietnam**. He raised more than \$150,000 on a mission trip in 2019 and returned again this year. National Life contributed \$7,500 in his honor.

Mike Wilk, a founder of Five Rings Financial in Littleton, Colo., was the runner-up, honored for the **Lee Nordine Academic Scholarship Program** named for a colleague who was a former teacher. A \$2,500 contribution was made in his name.

Board of Directors



Tom MacLeay
CHAIR

Tom MacLeay, Chair of the Board of Directors of the National Life Group Foundation, is the former President, CEO, and Chairman of the Board of National Life Group. Tom is also currently Lead Director of the Board of National Life Group as well as serving on the Board of Directors of Union Mutual Fire Insurance Company, eSecLending, Inc., and Let's Grow Kids.

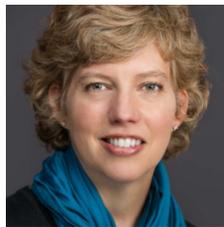
Tom is passionate about early childhood development and works tirelessly to educate others on the importance of early, quality child care.



Mehran Assadi

Mehran Assadi, is Chairman, Chief Executive Officer, and President of National Life Group. Mehran joined National Life in September 2003 as the Executive Consultant to the Chief Executive Officer charged with overseeing strategic initiatives. Since becoming President and Chief Executive Officer in 2009, Mehran has led major growth in both top and bottom line results of National Life's life and annuity products and has worked to build a culture of collaboration, engagement and empowerment among employees.

In addition to being an active member to the National Life Group Foundation, he joined National Life's Board of Directors in 2009 and was elected Chairman in 2017.



Beth Rusnock
PRESIDENT

Beth Rusnock, President of the National Life Group Foundation, is also the Head of Corporate Communications and Community Relations for National Life Group. In this role, she leads internal and external communications, corporate sponsorships, and employee and community engagement.

Beth co-founded Do Good Fest, a benefit music festival held in both Montpelier, Vermont and Arlington, Texas; established ending childhood hunger and addressing children's mental health as National Life's corporate causes; and has secured local, regional, and national media recognition for the company.

In addition to her day job, Beth is the Chair of the Board for Vermont Businesses for Social Responsibility. She also serves on the Working Communities Challenge Steering Committee led by the Federal Reserve Bank of Boston.

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Board of Directors continued



Nimesh Mehta

Nimesh Mehta is Senior Vice President and Chief Information Officer of National Life Group. He focuses on all aspects of technology operations to effectively align business and technology strategy with a customer centric focus. He was previously the Head of Life & Annuity Operations and also served as the Chief Strategy Officer and Chief Technology Officer at the company. Before joining National Life in 2008, he served in various leadership positions at Lincoln Financial Group for over 14 years.

Nimesh is involved with multiple nonprofit organizations in his community and has a particular interest in children's mental health.



Dawn Minter

Dawn Lee Minter joined National Life Group in 2009 as Executive Assistant to the Chief Marketing Officer. In 2015, she was promoted to Executive Assistant to the Chairman, CEO and President. She serves as a member of the executive leadership team, lead to National Life's administrative professionals, and liaison to the National Life Group Board of Directors.

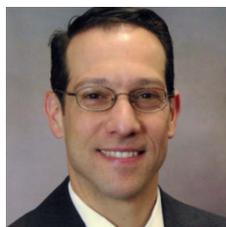
Dawn also serves on the board of directors of Vermont Children's Trust Foundation.



Scott Rogers

Scott Rogers joined National Life in 2018 as the Head of Facilities. He is an active volunteer and has helped organize the free Thanksgiving meals in Vermont since 2020. Scott also helped organize the first annual Do Good Fest in Texas, and serves as the Incident Commander for Do Good Fest Vermont. In 2020, Scott was chosen as part of the inaugural group of Culture Fellows.

In addition to being a member of our Foundation, Scott is also a member and past President of the Vermont Society of Engineers.



David Soccodato

David Soccodato is currently the Head of Claims at National Life Group and has been working with the National Life Group Foundation for over 10 years. As a CPA with a tax and accounting background, he has provided various financial advice and support as the Foundation's reach and community impact has grown. David has also served National Life as its controller and Vice President of Corporate Tax.

David is proud of what the Foundation has accomplished and is excited about the possibilities for the future. He actively supports hunger, food, and farm related activities in central Vermont.

Officers of the Board



Joe Heaslip

Joe Heaslip is the Investment Officer for the National Life Group Foundation and the Head of Risk and Quantitative Analytics for National Life Group. Joe joined National Life Group in 2008 by working in Sentinel Investments. Joe manages the endowment for the National Life Group Foundation with a focus on leaving a legacy of doing good.



Greg Mateja

Greg Mateja, Treasurer of the National Life Group Foundation, joined National Life Group in 2014 where he currently serves as the Head of Corporate Development. His responsibilities include Capital Management, Rating Agencies, Reinsurance, and Corporate Insurance in addition to his treasury responsibilities.



Keith Phelan

Keith Phelan, Tax Officer for the National Life Group Foundation, joined National Life in 2017 and leads its corporate tax team. He joined the company after 10 years in public accounting and one year at Keurig Green Mountain.

From 2015-2019, Keith ran an adult co-ed softball league sponsored by local businesses in the Burlington, VT area. He is also an active member in his children's activities as a little league baseball coach. Keith is a CPA and a member of the Vermont Society of CPA's.



Lisa Muller

Lisa Muller serves as Secretary of the National Life Group Foundation. Lisa currently works as Assistant General Counsel and Corporate Secretary to the operating companies of National Life Group.

In her role as Secretary and Chief Legal Counsel to the Foundation, she advises the board on its roles and responsibilities, attends and records minutes of all board meetings, facilitates board communications and maintains governance policies, records and documents for the Foundation and its Finance Committee.

Lisa serves as a trustee for Central Vermont Medical Center and is a member of the University of Vermont Health Network's audit and investment committees.



Jessica Russo

Jessica Russo, Operations Officer for the National Life Group Foundation, is a Community Relations Specialist at National Life Group. In 2019, Jessica joined National Life as an administrative assistant and then transitioned to Corporate Communications and Community Relations to help drive corporate social responsibility activities. Here she helps execute the philanthropic strategy, corporate events, and employee giving programs. She believes in National Life's values of do good, be good, and make good and wants to share these values across the communities in which National Life serves.

Jessica is very active in the community serving on the PTO and Board of Prevent Child Abuse Vermont.

General Grants

2022 LIST OF ORGANIZATIONS AWARDED GRANTS

Vermont Foodbank	Committee on Temporary Shelter	Friends of the Winooski River, Inc.
Hunger Free Vermont	Prevent Child Abuse Vermont	Friends of Veterans
North Texas Food Bank	Central Vermont Medical Center	Reach Out and Read, Inc.
City of Montpelier Community Services Department	Lund Family Center INC	SafeArt Inc
Champlain Housing Trust	For Love & Art	Housing Crisis Center
Vermont Council on Rural Development	Central Vermont Pioneers Inc	River Arts of Morrisville, Inc
Vermont Youth Conservation Corps	CCTV Center for Media & Democracy	Dallas Inter-Tribal Center
Family Place, Inc.	Mental Health America of Greater Dallas	Central Vermont Habitat for Humanity
Vogel Alcove	Grant Halliburton Foundation	Center for Sustainable Systems
The HUB	Common Roots, Inc.	Governor's Institutes of Vermont
Family Center of Washington County	Leahy Center for Lake Champlain, ECHO	Vermont Businesses For Social Responsibility Research and Education Foundation
Adaptive Training Foundation	Children's Craniofacial Association	MENTOR Vermont
Montpelier Rotary	Dallas Community Lighthouse	T.W. Wood Gallery
RISE Adventures DBA RISE Adaptive Sports	American Red Cross of New Hampshire & Vermont	Rescuing Leftover Cuisine, Inc
Washington Central Friends of Education	Howard Center	Traffick911
Denton County Friends of the Family, Inc.	Northwest Regional Foundation	Dallas County Historical Foundation DBA The Sixth Floor Museum at Dealey Plaza
Common Good Vermont	Vermont Works for Women	Vermont Women's Fund
Bridge Breast Network, Inc.	Building Bright Futures State Advisory Council, Inc.	Special Abilities of North Texas
Addison County Community Action Group, Inc	Capstone Community Action	Wesley-Rankin Community Center
Jewish Family Service of Greater Dallas, Inc.	Mi Escuelita Preschool	Spida Inc. dba Braswell Child Development Center
Clayton Dabney Foundation for Kids with Cancer	Renita Marshall Helping Hands Foundation, Inc.	Global Campuses Foundation
Youth Believing In Change Inc	Irving Cares, Inc.	Elevate North Texas
Community Harvest of Central Vermont Inc.	Green Mountain Habitat for Humanity	Montpelier Alive
Ronald McDonald House Charities Burlington, Vermont Inc	North Central Vermont Recovery Center	Greater Burlington YMCA, Inc.
	MRPS Partners In Education	Alliance For Children, Inc.
		Outright Vermont
		Hope Supply Co.

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Boys and Girls Club of Burlington
Vermont Historical Society
The University of Vermont Health
Network Home Health & Hospice
Genesis Women's Shelter and Support
Metrocrest Services, Inc.
Network of Community Ministries
Center for Health and Learning
Freezing Fun For Families, INC
Hope's Door New Beginning Center
Wilkinson Center
Revitalizing Waterbury
Good Beginnings of Central Vermont
Center for Survivors of Torture
Brighter Tomorrows
King Street Center
Good Samaritan Haven

Vermont Children's Trust Foundation
ChildCareGroup
Barre Housing Services
Salvation Farms, Inc.
Intervale Center
Lost Nation Theater
Parkland Foundation
Children's Literacy Foundation
PediPlace
Catamount Film and Arts Company
Sharing Life Community Outreach, Inc.
American Cancer Society, Inc.
Vermont Adaptive Ski & Sports
Mommies In Need
Just Basics, Inc.
ReSOURCE A Nonprofit Community
Enterprise Inc.

Studio Place Arts Incorporated
National Audubon Society
Just Say YES
Sail Beyond Cancer VT
Camp Ta-Kum-Ta
Family Gateway, Inc.
Faith in Action Northern
Communities Partnership
Central Vermont Adult Basic
Education, Inc.
Equest
Age Well
Vermont Family Network
Center for an Agricultural Economy
North Branch Nature Center
Family Compass
Central Vermont Home Health &
Hospice





National Life Group Foundation and Let's Grow Kids, with help from Beta Technologies, the electric aircraft company opened Kids Zone at the Burlington, Vermont airport designed to provide children with interactive activities and parents with a comfy spot to recharge.

What's Next

The National Life Group Foundation will continue to support nonprofit organizations with financial, in-kind, and volunteer donations.

We continue to fight to end childhood hunger and know there is more work to do.

We will also focus on opportunities to support children's mental health by working with experts throughout the country to provide resources teachers, parents and guardians can access for free.

We will celebrate our agents, school employees, and our local heroes who do good in their communities.

Because when we build strong connections, we build a strong future for everyone.