



Sharing the rich experience of giving



Improving communities



Advancing our profession



The PLUS Foundation is a **leading philanthropic force** in the professional liability community—with extensive reach and influence.

Our organization channels the resources and generosity of the professional liability industry directly into proven programs and innovative ideas that serve society, the industry and the communities where we work and live.

As a separate and distinct nonprofit organization, we serve the PLUS membership—and the entire professional liability community—by bringing forward charitable opportunities that are meaningful vehicles for engagement and impact.

We bring people together—to advance our profession, improve our community and share the rich experience of giving. Since our inception in 1998, the PLUS Foundation has invested **\$2.2 million in philanthropy, diversity and education.**

PLUS
FOUNDATION

From the President | Jeffrey P. Klenk

2010 was another great year for the PLUS Foundation. We again succeeded in our mission of engaging the professional liability industry in philanthropic and community outreach programs, even in the midst of continued financial challenges facing our country and industry.

The support of the Foundation's corporate sponsors, outstanding contributions from PLUS, and the membership's financial donations made it possible for us to again give generously to those in need. There is no better example than the \$46,000 we were able to provide The Children's Shelter in San Antonio as part of our annual Conference Cause. Beyond the dollars, what I am always moved by is the personal giving of time and resources by our members. Seeing PLUS members volunteer at the Shelter, or at the many other Chapter Charity volunteer events throughout the year, provides abundant evidence that ours is a generous and well meaning association of professionals. In 2010, we held twelve volunteer events, engaging nearly 300 volunteers, and giving over \$100,000 to our charities. I know all of us that have ever served on the Foundation Board of Directors would agree that we are lucky to be able to help channel that generosity, and we appreciate the opportunity.

Our two main fundraising events, Shots for Charity and Chips for Charity, were very successful in 2010. Shots celebrated its ninth year, raising \$45,000 for charity. This event has been a cornerstone for the Foundation since our beginning. Chips followed up its inaugural year in Chicago with a great event in San Antonio, again netting \$60,000 to support the Foundation's mission. Special thanks are due to the sponsors of those events, and to the planning teams that make them happen. During 2010, we built on the launch of our 2009 Women's Leadership Network by adding regional events in New York and Los Angeles. And we again featured a session at the International Conference. Our Diversity Committee is already working on ways to continue this momentum, as well as find ways to aid our member companies in promoting diversity in the industry.

As we move into 2011 we can all look at the Foundation's progress with pride. Our efforts not only help in performing good works, they advance the professionalism of our industry and project a positive image into the broader communities in which we operate. We hope that all of our members and member companies can readily see that value, and will support us in our fundraising efforts this coming year.

The Foundation team thanks you all for your support, financial and otherwise. We also welcome your ideas for programs, events and strategic direction.

This Foundation belongs to you.



A handwritten signature in dark ink that reads "Jeffrey P. Klenk".

2010 PLUS Foundation Board of Directors

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PLUS Foundation

Philanthropy | Chapter Charity Grants

The most tangible and effective giving often happens at a local level. Through a nomination process that is open to all members, the PLUS Foundation supports local charities across the United States and Canada—through grants and by supporting volunteer events. This unique grass roots model enables members to connect with each other and make a difference in their communities at the same time.

Since 2007 the PLUS Foundation has granted \$220,300 to 63 different charities and supported 37 volunteer events. This has enabled direct involvement of 500 PLUS member volunteers.



Philanthropy | Disaster Relief for PLUS Members

When major disasters affect PLUS members and their families, the PLUS Foundation is there—providing emotional and financial support after tragedies such as Hurricane Katrina and 9/11.



Philanthropy | Conference Cause

Each year, thousands of PLUS members gather for an event that is considered the industry's leading professional conference. The PLUS Foundation uses this opportunity to engage volunteers and raise funds to support a local charity in the city hosting the conference.

- **2010** The Children's Shelter of San Antonio

Fifty-five PLUS volunteers visited the shelter's campus. They worked to improve the grounds and enjoyed a play event with the kids. The \$46,000 donation to the shelter will be used to build a paved bike path.

History | TOTAL DONATED: \$263,000

TOTAL VOLUNTEERS: 446 | TOTAL VOLUNTEER HOURS: 1,200

- **2004** Armed Services YMCA of San Diego | \$33,000 donated
- **2005** Big Brothers/Big Sisters of Boston | \$28,000 donated
- **2006** Special Olympics Chicago | \$25,000 donated
- **2007** Walter Reed Society, Washington, D.C. | \$56,000 donated
- **2008** UCSF Children's Hospital, San Francisco | \$42,000 donated
- **2009** Greater Chicago Food Depository | \$33,000 donated



Research | Graduate Study Grant Program

Furthering research in the field of professional liability and encouraging students and professors to explore issues of importance to the industry. Fifty-two grants totaling \$176,000, since the program's inception in 2005. We appreciate our 2010 academic partners.

- University of Connecticut Insurance Law Center
- Florida State University
- Georgia State University
- St. John's University
- Stanford Law School
- University of Wisconsin Madison



Education | Gilmartin Scholarships

At a time when higher education has become more expensive—and perhaps more important—than ever, these programs provide four-year college scholarships to children of PLUS members and PLUS sponsor company employees.

- Four \$10,000 scholarships awarded in 2010
- Sixty-two scholarships totaling over \$500,000 awarded since the program's inception in 1996.



Diversity | Women's Leadership Network

The Women's Leadership Network creates opportunities to network and learn from the experience of women who are leaders by virtue of their achievements. The Foundation aims to raise corporate awareness of the value of developing and diversifying leadership. Proactive companies that encourage employees to participate in these events will help realize the overall industry goal of increasing the percentage of women in leadership roles.

- In 2010, 350 individuals attended regional events that were held in New York and Los Angeles, and a special session at the PLUS Annual International Conference in San Antonio.

Events | Shots for Charity & Chips for Charity:

These popular events have become great opportunities for PLUS members to have fun in support of a great cause. In **2010**, these events raised **\$105,000** to support the mission of the PLUS Foundation.



2010 PLUS Foundation Financial Overview

Where contributions went in 2010

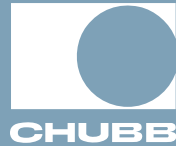
Program Giving	\$ 209,000
Program Administration	\$ 93,322
Events, Marketing	\$ 110,205
Operations	\$ 45,754
Total Expenditures	\$ 458,281

Contribute with confidence: Since 1988 the PLUS Foundation has demonstrated a strength for organizing successful initiatives, distributing gifts responsibly and ensuring that all standards are faithfully met. Through solid planning and administration, we ensure that the resources we receive are put to the best possible use.

Our People The PLUS Foundation would not exist without the generosity of our major sponsors; our corporate supporters, large and small; and the individual contributions of time, resources and talent from hundreds of PLUS members and volunteers.

We sincerely thank you.

CNA



Scottsdale Insurance Company
Surplus Lines of Arizona
XL Professional Insurance

Epstein, Becker & Green, P.C.
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To get involved with the PLUS Foundation or contribute to our programs, talk to us at a PLUS event, give us a call, or visit us online.

5353 Wayzata Boulevard, Suite 600
Minneapolis, MN 55416
P 952.746.2590 F 952.746.2599
www.plusfoundation.org