



advancing our profession
improving the community
sharing the rich experience
of contributing

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 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, recognition and impact.

We bring people together—to advance our profession, improve our community and share the rich experience of contributing.



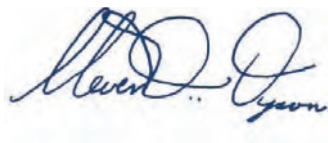
From the President

I have been involved with the PLUS Foundation since 2002 as a result of the 9/11 tragedy. The silver lining in tragedies is that good does eventually prevail. The PLUS Foundation story, so far, is one of leadership, participation, friendship, humility, trust and a sincere desire to perform good works on behalf of our insurance community. Greg Buonocore (RSUI), Ed Antonucci (AmWINS) and I wanted to sponsor a hockey game before the D&O Symposium to raise funds to support PLUS-affiliated families that lost their spouses and parents on 9/11. After that event's initial success, Foundation Director Chris Cavallaro (ARC Excess & Surplus) asked one of us to join the Foundation Board. I drew the short straw. Turns out to be one of the best short straws I've ever drawn, even though I didn't know it at the time.

For a guy who looks at this business as O&D insurance, I now found myself in a board room with our industry leaders. It turns out these guys are the biggest bunch of softies I've ever met, and they simply wanted to create a tradition of giving back. As a result of the "Shots for Charity" hockey game and the 9/11 Victim's Campaign, we decided as a Board to turn our efforts to philanthropic work, promoting diversity and extending the goodwill of our industry to affect positive change in the communities in which we live and work while also continuing to further educational knowledge and research. The silver lining is cast.

Since 2002 the value of the PLUS Foundation has improved dramatically due to the hard work of our Board, volunteers and sponsors. WE are now helping to attract bright talent to our industry while promoting diversity. WE are building bridges to the academic world to zero in on issues to be researched that are relevant industry topics. WE offer our members and sponsor companies a different avenue to engage and identify with the entire PLUS organization. WE are coordinating the financial and human resources within our insurance community to have a positive impact on society through volunteerism and philanthropy. And, WE are helping to build a stronger chapter network, the lifeblood of the PLUS organization, through charitable and networking events.

As outgoing President I am proud, and you should be proud, of what we have built together; a tradition of giving back because it's the right thing to do. My good friend David Williams (Chubb) is now in charge as PLUS Foundation President. Along with our other stellar Directors, David will lead the PLUS Foundation in expanding OUR works of philanthropy, diversity and education into the future.



Steven D. Dyson

"People in this industry want to contribute. And we are privileged to be in a position to contribute. The PLUS Foundation gives us all the opportunity to make deeper connections to the community and find more meaning in our professional relationships and work. The Foundation is here to channel the charitable efforts of the professional liability industry and to let the world know about the generosity and genuine caring of the people in this field—working together to improve society." -David B. Williams



Steven D. Dyson
PLUS Foundation
President 2006 -2007
E-Risk Services



David B. Williams
PLUS Foundation
President 2008
Chubb of Canada

OUR PRIORITIES

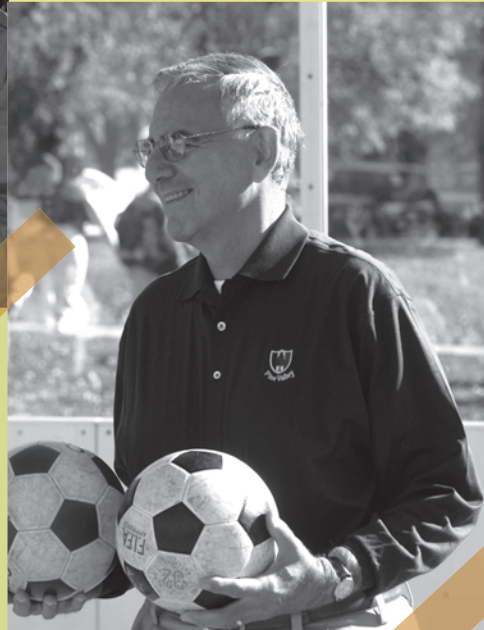
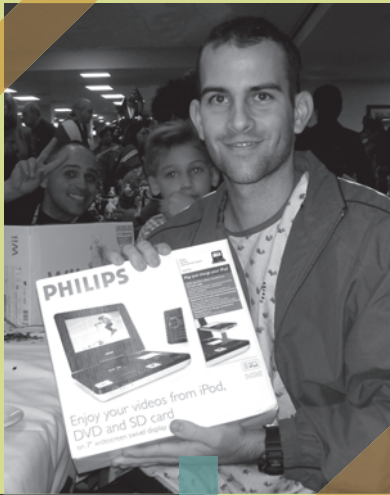
The PLUS Foundation is a conduit and a catalyst for charitable engagement in the professional liability community—bringing individuals and groups together to maximize the impact of their efforts. *We focus our activities in four core areas:*

Philanthropy

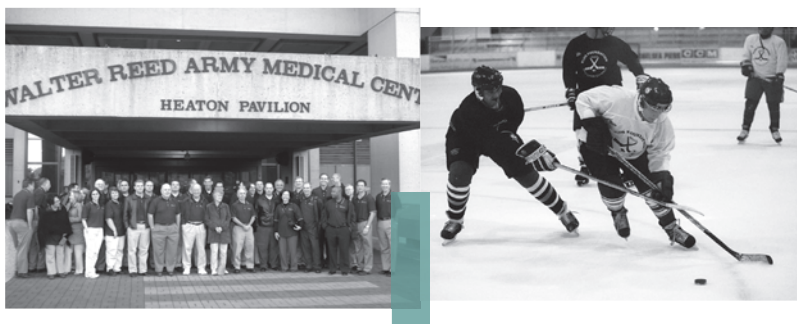
Diversity & Outreach

Education & Research

Awareness & Recognition



OUR PROGRAMS



Chapter Charity Grants

The most tangible and effective giving often happens at a local level. Through Chapter Charity Grants, the PLUS Foundation supports the efforts of individual PLUS Chapters throughout the United States and Canada—enabling members to make connections with each other and make a difference in their community at the same time.

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.

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.

Minority Intern Grant Program

This program sponsors high performing college students in internship positions within PLUS companies—to promote diversity and recruit new talent into the professional liability industry.

Graduate Study Grant Program

To further research in the field of professional liability and encourage young scholars, our Graduate Study Grant Program supports graduate and Ph.D. level students with research assistance grants.

Gilmartin and Financial Aid Scholarships

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

Shots for Charity

Since 2002, this popular event has become a great opportunity for PLUS members to have fun and get physical in support of a great cause. The annual hockey game and fundraiser is held in conjunction with the annual PLUS D&O Symposium.

PLUS Foundation Leadership Award

The PLUS Foundation sponsors an annual fundraising dinner to recognize and celebrate luminaries and leaders in the field of healthcare professional liability.

● PLUS Chapters /
Chapter Charity Grant Beneficiaries

✦ Conference Cause Events /
Beneficiaries

❖ Graduate Study Grant Programs/
Institutional Partners

🌀 Disaster Relief Efforts

● Canada Chapter:
Canadian Sunshine Kids Foundation

● Northwest Chapter:
New Beginnings

● Northern California Chapter:
Coleman Advocates for Children & Youth

❖ Stanford University - School of Law

● Southwest Chapter:
Gateway Battered
Women's Services

Chicago, 2006 - Sp
Special Children's

● Southern California Chapter:
Women's Care Cottage

✦ San Diego, 2004 - Armed Services
YMCA of San Diego

● Texas Chapter: Ark Hous

From national events like Shots for
Charity and Conference Cause to local
chapter grants and volunteer programs,
we are **making connections and making
things happen**—all across North America.



North Central Chapter: Rein in Sarcoma Fund

University of Wisconsin, Madison - Graduate Business School

Special Olympics/ Charities of Chicago

Midwest Chapter: Special Children's Charities/Special Olympics

Southeast Chapter: Children Are People, Inc.

New Orleans, Hurricane Relief 2005

Georgia State University - The Robinson School

Florida State University - College of Business

New England Chapter: Boston Scholars

Boston, 2005 - Big Brothers Big Sisters of Boston

University of Connecticut - Insurance Law Center

Hartford Chapter: Channel 3 Kids Camp

Manhattan, 9/11 Victims Campaign

St. John's University - School of Risk Management, Insurance & Actuarial Science

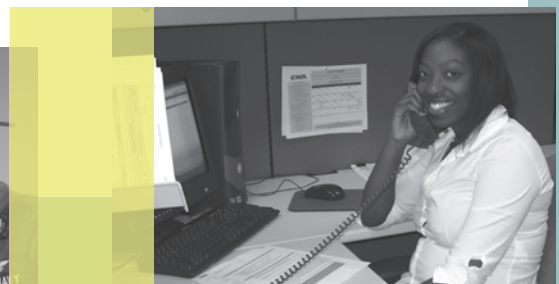
University of Pennsylvania - The Wharton School

Mid-Atlantic Chapter: Alex's Lemonade Stand

Washington D.C. 2007 Walter Reed Society

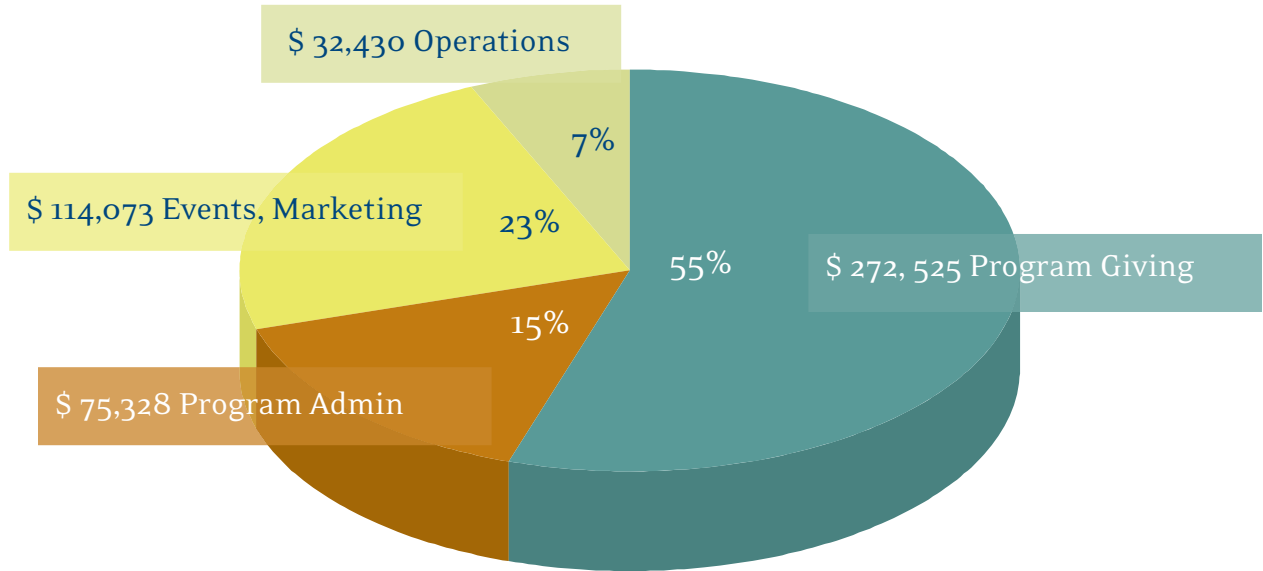
OUR 2007 ACCOMPLISHMENTS

- All 13 PLUS chapters took advantage of our Chapter Charity Grants program awarding \$32,500 in grants to select local charities.
- 48 PLUS Foundation volunteers hosted the annual Conference Cause dinner and entertainment event in Washington, D.C., for recovering soldiers, family members and caregivers—and raised \$56,000 for the Walter Reed Society.
- 20 high-performing college students participated in our Minority Intern Grant Program—taking internship positions within 10 PLUS companies.
- 14 graduate students at 7 universities received \$49,000 in funding for research of professional liability topics through our Graduate Study Grant Program.
- 6 children of PLUS members and PLUS sponsor company employees received four-year college scholarships through the Gilmartin and Financial Aid Scholarship programs.
- The 2007 Shots for Charity hockey game in New York City raised \$63,000 for PLUS Foundation.
- On March 13, more than 120 PLUS members attended the 2007 PLUS Foundation Leadership Award Dinner, where Robert F. Orlich, President and CEO of Transatlantic Holdings, Inc. received the award for Outstanding Leadership in Healthcare Professional Liability and \$34,000 was raised to support foundation initiatives.



FINANCIAL OVERVIEW

WHERE CONTRIBUTIONS WENT IN 2007



\$494,356 Total Expenditures

CONTRIBUTE WITH CONFIDENCE

Since 1998, the PLUS Foundation has established a solid track-record of identifying appropriate endeavors, organizing successful initiatives, distributing gifts responsibly and ensuring that all expectations and standards are faithfully met. Through solid planning and efficient 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.



MARSH MERCER KROLL
GUY CARPENTER OLIVER WYMAN

ARC Excess & Surplus
Arlington Roe & Company
Darwin Professional Underwriters, Inc.
Liberty International Underwriters
Lockton Companies
Professional Indemnity Agency
Ross, Dixon & Bell
Scottsdale Insurance Company
XL Insurance

We are also indebted to our Board of Directors for their generous contributions and their able guidance and leadership as we strategically expand the Foundation's influence and impact.

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PLUS
FOUNDATION

Philanthropy
Diversity & Outreach
Education & Research
Awareness & Recognition

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