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.

National Life Group® is a trade name representing various affiliates, which offer a variety of financial service products.
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.

Believe in tomorrow. Do good today.

Beth Rusnock
President and CEO,
National Life Group Foundation
The National Life Group Foundation has increased its budget by 15 percent, bringing the total to $2.3 million.

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

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

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.

SHARE THE GOOD

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

210 Grant requests.
154 Grants approved.

$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.

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.

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

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

“A national life is a financial services company with a soul.”
– Mehran Assadi
Grant Allocations by Donation

TOTAL: $1,292,250

- Mental Health: $377,750
- Arts and Recreation: $37,000
- Community Development: $187,000
- Health and Human Services: $31,500
- Hunger: $659,000

Distribution of Funds by Location

- Vermont: 73.94%
- Texas: 23.95%
- New York: 0.6%
- Connecticut
- District of Columbia
- Massachusetts
- Pennsylvania
Our donation to the Vermont Foodbank helped provide 300,000 meals for food insecure Vermonters.

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

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

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

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.

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

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

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

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

We Build on the Connections We Make

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

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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.

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.

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.

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.

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.

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.
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<td>City of Montpelier Community Services Department</td>
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<td>Champlain Housing Trust</td>
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<td>Dallas County Historical Foundation</td>
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<td>Vermont Women's Fund</td>
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<td>Wesley-Rankin Community Center</td>
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<td>Spida Inc. dba Braswell Child Development Center</td>
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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
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.