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.

**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 Feb 2018 by the Senate to remove Special Projects provision
- 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></th>
<th>FY17</th>
<th>FY18</th>
<th>FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awards</td>
<td>$0.1</td>
<td>$0.1</td>
<td>$0.1</td>
</tr>
<tr>
<td>HQ</td>
<td>$7.4</td>
<td>$7.7</td>
<td>$8.2</td>
</tr>
<tr>
<td>Scholarships</td>
<td>$0.6</td>
<td>$0.7</td>
<td>$0.7</td>
</tr>
<tr>
<td>Designated Fund</td>
<td>$2.6</td>
<td>$2.8</td>
<td>$2.8</td>
</tr>
</tbody>
</table>

### SWE-RF Assets ($Million)

<table>
<thead>
<tr>
<th></th>
<th>FY17</th>
<th>FY18</th>
<th>FY19*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve Fund</td>
<td>$4.2</td>
<td>$4.4</td>
<td>$4.7</td>
</tr>
</tbody>
</table>

### FY19 IMPACT

- **In FY19, SWE EFI Provided**
  - $263,850
  - 119 Scholarships
- **$110,077**
  - General Support for SWE HQ
- **$26,210**
  - 208 Awards
- **$2,673**
  - 3 Designated Fund Distributions

### FY20 TRUSTEES

From left to right:
- Mary Studlick (Treasurer FY19-FY21)
- Marge Inden (FY18-FY20)
- Paula McDonald (FY20-FY22)
- Cassi Janakos (FY19 – FY21)
- Ester Barbuto (FY20-FY22)
- Dianne Beever (FY19-FY20)
- Janis Mantini (Secretary FY18- FY20)
- Sandra Postel (Chair FY19-FY21)

### Join Us

- Do you have experience with investing? Are you interested in the markets?
- Check out our Webinar – SWE Board of Trustees: Role and Function

### Contact Us:

bot@swe.org