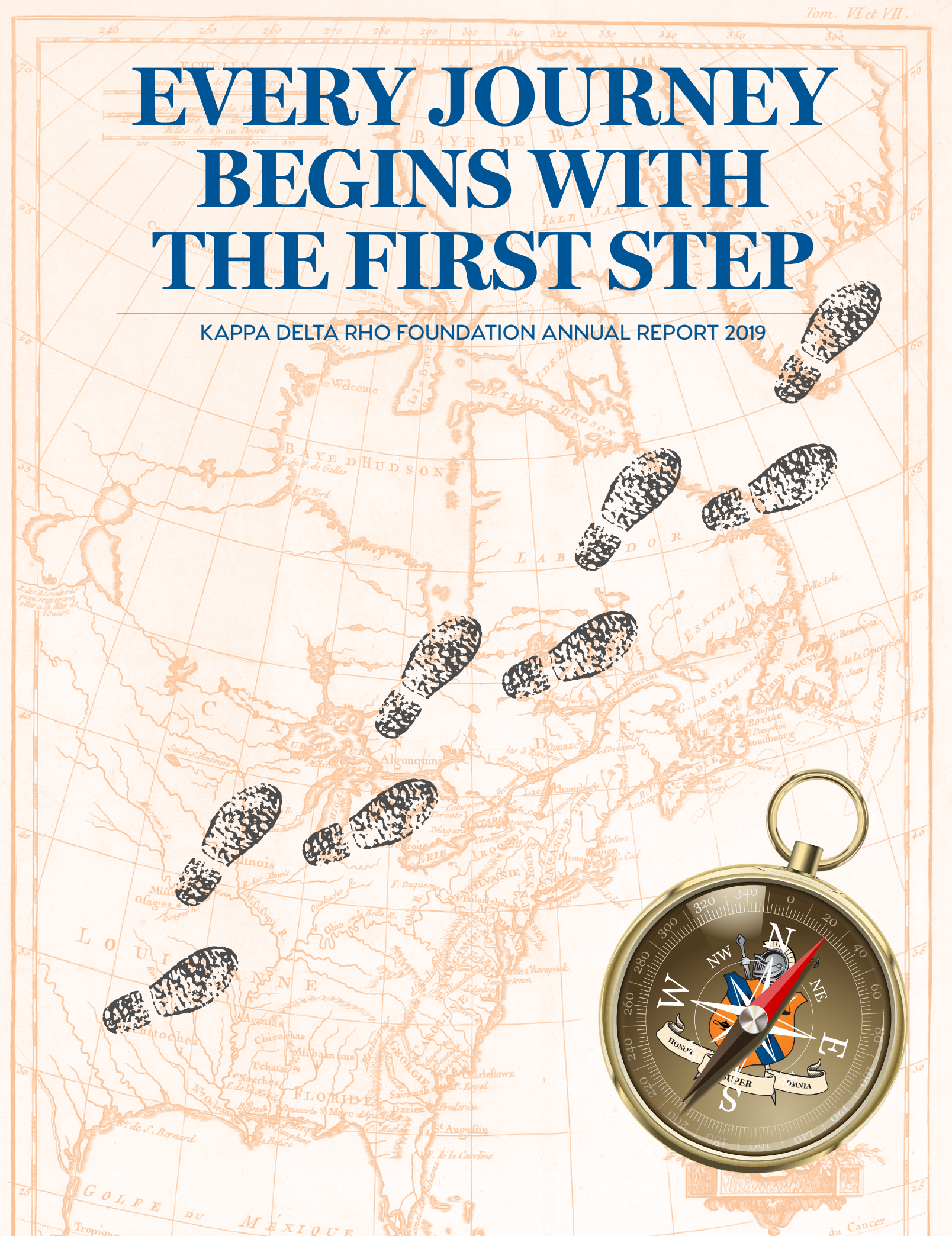
EVERY JOURNEY BEGINS WITH THE FIRST STEP

KAPPA DELTA RHO FOUNDATION ANNUAL REPORT 2019



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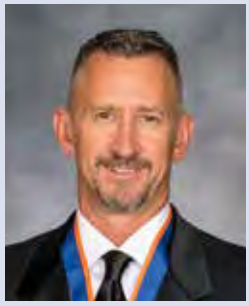

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There is an old Chinese proverb: "The longest of journeys begins with a single step."

GREGG KLEIN, OMICRON ALPHA '96,
KDR FOUNDATION PRESIDENT

Hello, and thank you for reading the fifth edition of the Kappa Delta Rho Foundation Annual Report. I am proud to tell you that 2018-2019 was another strong year for the Foundation. We awarded a record number of scholarships and finalized significant longstanding plans.

We live in challenging times. The world today seems more complicated and less certain. Sadly, many of these issues are having a tremendous impact on college campuses where we operate. The Foundation Board of Trustees and the Fraternity Board of Directors are committed to doing more to support our undergraduates overcome these challenges. Over the past year, we have designed and laid out a long-term plan for the "ideal Fraternity." We know this plan will take time and money to be achieved, but we also know that Kappa Delta Rho is about to take a large step forward.

Progress is often made in small steps. For example, in 1869 a group of Rutgers students issued a challenge to Princeton. One hundred fifty years later, college football is an institution. In 1950, a group of scientists gathered in Huntsville, Alabama. Nineteen years later, Neil Armstrong walked on the moon. Both began with a single step.

The next step for Kappa Delta Rho is a long-term multi-generational plan designed to provide Mental Health Awareness and support, promote and strengthen responsible personal behavior, and provide leadership skills and academic support to our undergraduate members. Put simply: the plan is designed to prepare our Brothers to pay for college, secure a job, and become the future leaders of their communities. This plan is known as Brothers' Keeper.

Expect to hear more about Brothers' Keeper in the months ahead. It will be a watershed moment for Kappa Delta Rho and a model for the entire Greek system. KDR is taking the lead in these challenging times.

The Kappa Delta Rho Foundation has one simple purpose: raise funds to provide educational and leadership training for the members of the National Fraternity of Kappa Delta Rho. We fund the annual Elmon M. Williams Leadership Academy, the Consuls Academy, provide grants to the Fraternity to offset dues for the undergraduates, and award more than $100,000 in scholarships annually. We intend to help fund Brothers' Keeper, including financial support from every member of both boards.

We know that with Brothers' Keeper, Kappa Delta Rho is about to take a large step forward.

All of these plans are made possible solely by your support. Thank you. Please join me by supporting the Foundation, volunteering to mentor undergraduates, or participating in Alumni corporations and associations and networks. KDR needs you more than ever!

Please join us with your support and take the next steps on our journey as we build a model Fraternity.

Honor Super Omnia!

Gregg M. Klein, Omicron Alpha '96

Impact of Your Generosity

MARK S. WEST, UPSILON ALPHA '88
VICE PRESIDENT OF DEVELOPMENT
AND COMMUNICATIONS

I'm pleased to announce that you helped raise just over $142,000 this past Fiscal Year (FY) for the Annual Fund.

Five hundred sixty-four (564) Brothers provided support for our Annual Fund. Your support enabled us to directly impact the lives directly of 125 undergraduate Brothers through $98,600 in scholarships, 41 Brothers attending Consuls Academy, 43 Brothers attending Elmon M. Williams Leadership Academy, 681 Brothers completing our award-winning membership education program "The Legion."

We have traveled far from our journey as a Foundation which started in 1986. This past fiscal year, as a Brotherhood, we recorded our 6th highest Annual Fund giving, which demonstrates the continued commitment of our alumni, undergraduates, parents, and friends of the fraternity.

Additional highlights from last fiscal year include:

- Total giving increased by 29.0% over the previous fiscal year. We raised nearly $341,000 between the Annual Fund, Restricted Giving, and Scholarships.
- KDR Parents continue their generosity with 49 gifts made on behalf of a KDR Brother to the Annual Fund.
- In the area of Restricted Giving (gifts other than the Annual Fund), we raised over $148,000 with 62 percent going toward Brothers' Keeper (a new initiative of ongoing support for the Brotherhood which includes educational, leadership, character development programs, and mental health resources to support our Brothers).
- Scholarships had another great year with gifts coming in just over $51,000.

You are truly passionate about KDR, and it shows through the contributions you have made this past year, whether donating your time, your talent, your financial support, or all three.

I want to thank all of you who have helped this past year in our journey to strengthening KDR's foundation and ask for your continued support moving forward.

Fraternally,

Mark S. West

Mark 'Shelby' West
Upsilon Alpha '88
Vice President of Development & Communications

▲29%	**TOTAL GIVING** increased by **29.0%** over the previous fiscal year. We received nearly **$341,000** between the Annual Fund, Restricted Giving, and Scholarships.
49	**49** gifts were made by KDR Parents on behalf of a KDR Brother to the Annual Fund.
62%	In the area of Restricted Giving (gifts other than the Annual Fund), we raised over **$148,000** with **62 percent** going toward Brothers' Keeper.
$51,000	Scholarships had another great year with gifts coming in just over **$51,000**.

Kappa Delta Rho concludes historic feasibility study related to the Brothers' Keeper program

BILL PARIS, ETA '87
TRUSTEE,
BROTHERS' KEEPER CAMPAIGN CO-CHAIR

In the past year the National Fraternity staff and leadership recognized that among our undergraduate Brothers there were many who were struggling emotionally and psychologically. We have all heard in the news about the mental health challenges among young, college age people and the tragic resulting rise in self-harm and suicide.

Our Brotherhood is not immune. We have lost Brothers to suicide. Three (3) in the last year alone! You could argue this is a societal issue and not a "KDR issue." That would be true. But, I'm proud to say rather than do nothing, our Fraternity is stepping up and asking, "what can we do"? "How can we help our younger Brothers"?

> *Stand up and say "yes, I will be my Brothers' keeper."*

We can all be proud of our Fraternity for developing a multi-pronged program called Brothers' Keeper. When I say multi-pronged, there are several initiatives that will be forthcoming: A partnership with the JED Foundation making an on-line resource for Brothers available. **http:/kappadeltarho.ulifeline.org/** is live now; a program called "TALKSPACE" providing a live counselor available in real-time 24 hours a day; Officer and Member training at various workshops and in chapters addressing Mental Health First Aid.

Like all things in life, to implement the programs requires resources. Many of you very likely participated in a recent Feasibility Study exploring alumni support for the implementation of the Brothers' Keeper program. Thank you to the hundreds of Brothers who responded! We realize it's a big effort and a grand vision. We appreciated the frank discussion and good suggestions offered. Naturally there were those who asked whether it was our role to try and intercede? Most respondents and participants boiled it down to "how can we not at least try to provide resources which could help a young man on the edge" All acknowledged the reality that we may never know the young life we help or even save. But nearly all agreed, how can you put a price on that?

In the coming weeks and months Kappa Delta Rho will be embarking on the greatest challenge and program in its history to fund the Brothers' Keeper initiative. I hope you are as proud of KDR as I am as we boldly go forward and each, in our own way, stand up and say "yes, I will be my Brothers' keeper".

If you would like to help as a volunteer coordinator to organize your chapters' or your classmates' participation please contact Bill Paris, Eta '87 at: bparis@elevateims.com or cell (404) 441-9630.

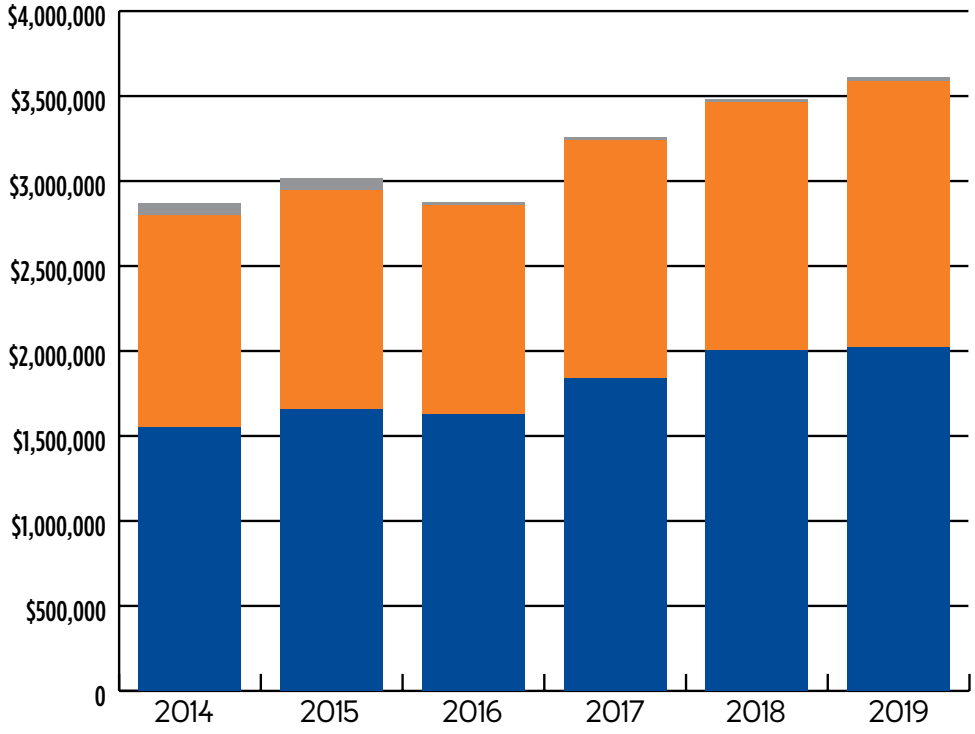
Brother Paris speaking with undergraduate Brothers attending the 2019 Elmon M. Williams Leadership Academy.

A financial overview of the Kappa Delta Rho Foundation

J. HALL JONES, JR., LAMBDA BETA '91
VICE PRESIDENT OF INVESTMENTS

The Kappa Delta Rho Foundation provides a vital support function in the growth and success of Kappa Delta Rho by providing financial resources to keep our fraternity strong and growing. With the support of our alumni and friends, **more than $271,170** has been granted to the Fraternity for educational and leadership programming since 2014. **In addition, $636,200** in chapter specific or field of study specific scholarships has been awarded to Kappa Delta Rho undergraduates and alumni during this time.

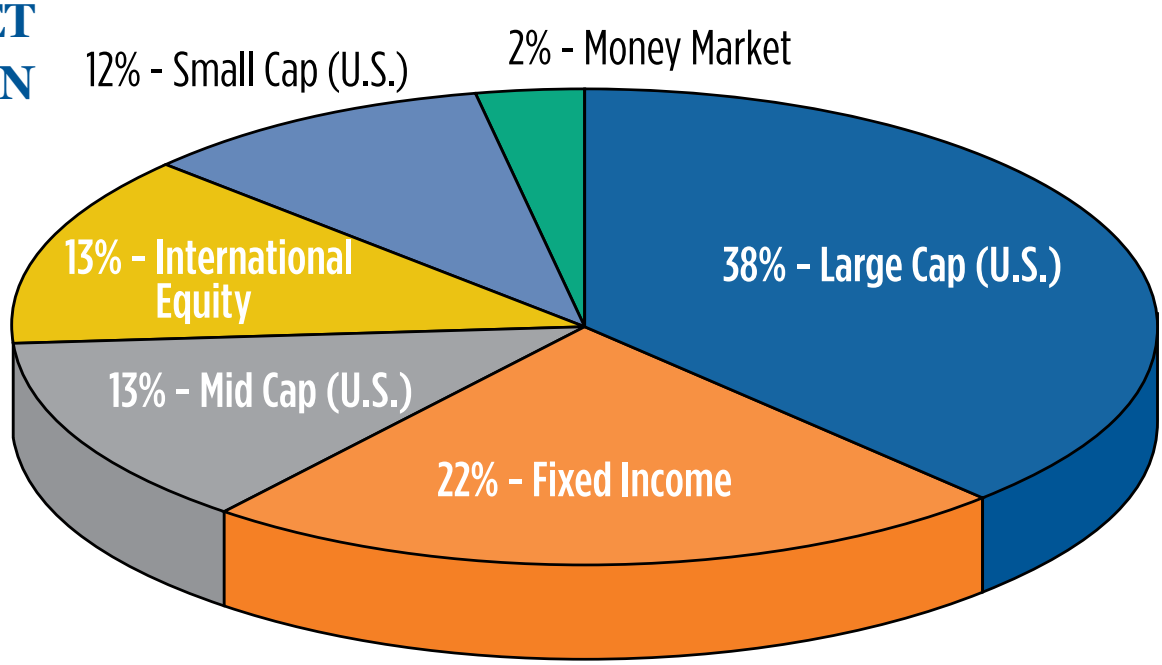
ASSETS UNDER MANAGEMENT
(as of June 30)



An additional avenue of service provided by the Foundation is offering short-term loans to chapters in need through the Chapter Loan Fund. The Fund was established by the Trustees to make loans as an aid to chapters or alumni corporations of the fraternity in building, remodeling, purchasing, financing or refinancing chapter houses or for acquiring equipment, furnishings, or fixtures for the chapter. The Fund acts as a revolving fund and all loan payments, including interest are retained within the Fund and recycled for future chapter loans.

The Foundation's asset allocation places priority on preserving endowment corpus by conservatively investing in a mix of equity and debt index funds to produce investment returns at a rate exceeding inflation. The Investment Committee of the Foundation is responsible for the management of all endowed funds of the Kappa Delta Rho Foundation. These funds include the general endowment, which supports the educational programming of the Fraternity, as well as the numerous scholarships designated to support the ongoing education of our active members and alumni pursuing undergraduate and graduate degrees.

ASSET ALLOCATION



The Foundation fully supports the creation and endowment of new scholarships and has established policies governing restricted purpose and endowment funds consistent with applicable law. We account for these assets in separate funds based on fund purpose and donor-imposed restrictions. The Foundation seeks to preserve the corpus and utilize only earnings for all endowment funds with a current maximum payout rate of 5% (as defined in its Investment Policy Statement – revised 2011). An endowment fund is formed only upon the creation and acceptance by the Foundation of an Endowment Fund Agreement that conforms to relevant policy. In recent years, several scholarships have become fully endowed including the Paul Downes Iota Beta Scholarship Fund, the Robert D. Lynd Scholarship Fund and the Iota Beta Chapter Scholarship Fund.

Chapters that have fully endowed scholarships include:

- Beta (Cornell University)
- Zeta (Pennsylvania State University)
- Eta (University of Illinois)
- Theta (Purdue University)
- Iota (Bucknell University)
- Nu (Indiana University)
- Rho (Lafayette College)
- Nu Alpha (Columbia University)
- Pi Alpha (University of Toledo)
- Zeta Beta (Tarleton State University)
- Iota Beta (Rochester Institute of Technology)
- Lambda Beta (James Madison University)
- Phi Beta (College of William and Mary)
- Beta Gamma (Christopher Newport University)

2019 PARENTS FUND

ALOK KAPOOR, IOTA BETA '93
AND RAJ KAPOOR, IOTA BETA '20

It has been nearly thirty years since the chartering of the Iota Beta chapter of Kappa Delta Rho at the Rochester Institute of Technology. It was there at RIT in my sophomore year that I was introduced to KDR by fellow Brothers that were working in a student government association along with me. They described a new, different kind of fraternity they were forming. Something well beyond the stereotypes I was familiar with. My intrigue grew from there – and little did I know how much of an impact that fortuitous encounter would have on the rest of my life. So much of who I am today can be tied back to my becoming a man as a KDR at RIT.

Not too long ago one of my sons started his college experience at RIT and seeing what an impact the fraternity had on me, and the lifelong connections he saw that came with it, to my pleasure he too pledged KDR. While his path was different than mine, the support and comradery of his brothers were the same.

So I am both a proud Kappa Delta Rho brother and parent and want to avail every opportunity to support our KDR students in all aspects of their lives, to enable them to become the best version of themselves. I know KDR helped me and continues to in that constant quest I have in becoming a better person. And I view the KDR Foundation Parents Fund as one vehicle parents have in supporting KDR students. The KDR Foundation provides a vast array of scholarship opportunities.

Thanks to the Foundation, our KDR sons have access to scholarships and leadership development programs that will help them academically and professionally. This past year the Foundation awarded over $100,000 in scholarships. It also sponsored high-quality education programs, such as the "Legion," Williams Leadership Academy, and the Consuls Academy, which teach our sons valuable social and leadership skills. These programs do have a price tag, however. Please join my wife and me in supporting the Kappa Delta Rho Foundation Parents Fund. All donations are tax-deductible! Visit KDRfoundation.org to learn more about the Foundation and to donate online. If you would like more information on the KDR Foundation, contact Gregg Klein, President of the Kappa Delta Rho Foundation, at (973) 951-3657 or e-mail at mgmgregg@yahoo.com to learn more about the importance of the KDR experience in your son's life.

PARENTS FUND DONORS

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Greg Beitel
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Dennis Carlesso
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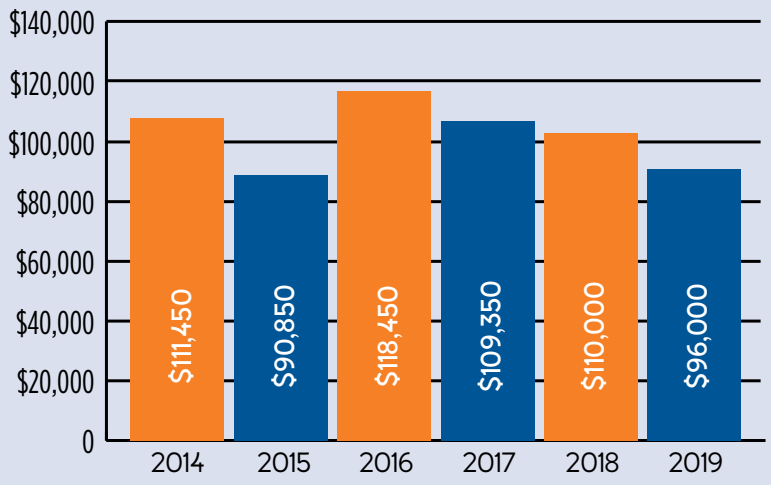
KDR FOUNDATION SCHOLARSHIPS

The Foundation is proud to announce 50 members from 21 chapters were awarded scholarships from the 81 applicants who completed the application process.

Support of the Kappa Delta Rho Foundation and its scholarships allows us the opportunity to give back to KDR and assist those who have come after us in the Fraternity. This is clearly understood by one undergraduate Brother this past year who wrote:

"Thank you for generous donation to the Kappa Delta Rho Foundation. Because of the amazing donors, like yourself, students like me are afforded the opportunities of a lifetime to be Brothers of an outstanding organization. I see your donation as an investment. An investment in KDR, an investment in myself and an investment in the future. My family can no longer assist me in paying for my education. I simply cannot express how thankful I am for your donation. Actions such as yours inspire me to look for ways to give back in my daily life as a way of paying it forward. It is amazing to see the generosity and spirit of the KDR values so greatly represented in our Brothers and Alumni. Honor Super Omnia"

SCHOLARSHIPS DISTRIBUTED 2014-19



Gratitude is an important element in life. As part of the application process, Brothers can prospectively submit a voluntary Thank You letter which isn't part of the selection process, and we would like to share one with you.

"I want to start by saying thank you. Thank you for making an impact on my life in more ways you could imagine. This scholarship affects my life in more ways than you'd think. I come from a family that's never had much; my dad was our sole provider, but since his retirement I've been under unbelievable stress. Not a day goes where I don't think about how I'm going to pay for school. This scholarship allows me to breathe a little easier, focus more on school rather than on money, and gives me the freedom I need to be an active member in my chapter. Knowing someone has enough faith in me to invest in my education has given me the motivation I need to keep chasing my dreams. I may not know you and I may never meet you in-person, but I need you to know that you have affected my life for the better and I'll never forget that. One day I will pass this generous gesture on to the next KDR in need, but for now all I can say is thank you for what you've done for this KDR.

We are proud to recognize the achievements and character of so many KDR Brothers which are unfortunately not the types of stories that get aired by the media. Our fraternity is filled with amazing Brothers who today are leaders on campus and will later be leaders in our communities.

The Foundation is proud to announce 50 members from 21 chapters were awarded scholarships from the 81 applicants who completed the application process.

Brother Bryan Scanapieco, Beta '19 with Brother Lance Peter, Psi Beta '21 and Daniel Terrell, Nu Alpha '21 at the 2019 Elmon M. Williams Leadership Academy.

2019 SCHOLARSHIP RECIPIENTS

Alexander Aguilar, Kappa Gamma '20
Rho Alumni Scholarship

Bryce J. Allen, Epsilon '21
Commerford B. Martin Engineering Scholarship

Benjamin Alonso, The College of New Jersey '22
General Undergraduate Scholarship

Christopher Anderson, Theta '21
William C. Hogan Memorial Scholarship

David S. Berbary, Iota Beta '20
Commerford B. Martin Engineering Scholarship
Rho Alumni Scholarship

Blake Bowman, Lambda Gamma '20
Rho Alumni Scholarship

Gary Braznichenko, Eta '21
Thomas P. Burns Memorial Scholarship
Commerford B. Martin Engineering Scholarship

Ian Carmody, Kappa '22
General Undergraduate Scholarship
Wally T. Miller Memorial Scholarship

Noah Carter, Nu '21
Nu Chapter Scholarship

Daniel Caulfield, Eta '22
Dale W. Schaffenacker Scholarship

Bryan Cornelius, Nu '21
Nu Chapter Scholarship

Anthony Crawley, Eta '22
William J. Paris Scholarship

Nathan R. Cuculic, Pi Alpha '20
Rho Alumni Scholarship

Tony D'Amico, Pi Alpha '20
Rho Alumni Scholarship
Past Recipients Scholarship

Daniel DeButts, Phi Beta '21
Rho Alumni Scholarship

Chris DeJesus, Beta '21
Hansen Scholarship

Dexter Delandro, Iota Beta '22
Iota Beta Scholarship

Gabriel D. Donnelly, Nu '19
Nu Chapter Scholarship

Joseph Feldman, Epsilon Beta '20
Commerford B. Martin Engineering Scholarship

Charlie Ferguson, Kappa '22
Kenneth C. Cramer Scholarship
Rho Alumni Scholarship

Stephen W. Fike, Beta Gamma '21
John C. Carl Scholarship

Evan T. Flatt, Beta Gamma '20
Robert D. Corrie Memorial Scholarship

Conan W. Gillis, Beta '21
Pi Alumni Scholarship
John C. Carl Scholarship
General Undergraduate Scholarship

Connor Henderson, Nu '22
E. Mayer Maloney Memorial Scholarship
Nu Chapter Scholarship

Abraham E. Hinterlach, Zeta Beta '21
Richard Petronis Scholarship

Justin Hopkins, Theta '20
Theta Veterans Scholarship

Jeffrey Hornsby, Pi Alpha '22
John C. Carl Scholarship

Abrahm D. Hurt, Epsilon '20
O.D. Roberts Memorial Scholarship
Horace E. Shackelton Scholarship

Ethan Jaap, Theta Alpha '22
Rho Alumni Scholarship

Jacob Kerkstra, Eta '22
Guy L. Davis Scholarship

Payton K. Kittaka, Epsilon '20
Rho Alumni Scholarship

Austin T. Krohn, Iota Beta '20
Paul A. Downes Scholarship

Benjamin Lazarus, Phi Beta '19
Robert D. Lynd Scholarship
Peregrine Falcon Scholarship

Andrew Loughran, Iota '21
Iota Fund Scholarship

Jonathan Marquina, Iota '21
Rho Alumni Scholarship

Gerald McKim, Xi Alpha '21
Rho Alumni Scholarship

Evan S. Norris, Nu '21
Nu Chapter Scholarship

Daniel O'Neil, Iota '20
Iota Chapter Scholarship
Lee H. Idleman Memorial Scholarship

Jack Pihlkar, Nu Alpha '21
Nu Alpha Scholarship

Tyler Rist, Theta '20
John C. Carl Scholarship

William Ryu, Phi Beta '21
Robert D. Corrie Memorial Scholarship

Zachary R. Seger, Eta Alpha '19
John C. Carl Scholarship

Shiven Shah, Xi Alpha '19
Johnson Law Scholarship

Troy Smith, Beta '20
Hansen Scholarship

Suhas Suddala, Phi Beta '22
Kenneth C. Cramer Scholarship
Rho Alumni Scholarship

Zackary Swoboda, Nu '22
Nu Chapter Scholarship

Daniel Terrell, Nu Alpha '21
Nu Alpha Scholarship

Quentin J. Ullrich, Phi Beta '17
Graduate Scholarship

Vathasinlapa D. Vasavong, Iota Beta '22
Iota Beta Scholarship

Brandon Walker, Pi Alpha '20
James Edgeworth Scholarship

Gage Warrell, Kappa '22
Rho Alumni Scholarship

Benjamin Y. Xing, Beta '21
John C. Carl Scholarship

BELOW: Scholarship recipients Brothers Evan Flatt, Beta Gamma '20; Zackary Swoboda, Nu' 22; Blake Bowman, Lambda Gamma '20; Jacob Kerkstra, Eta '22 with the KDR Foundation Trustees at the 2019 Elmon M. Williams Leadership Academy.

NEW MEMBER SCHOLARSHIP RECIPIENTS

FALL 2019

William Babcock, Iota '21
Ray C. Benjamin, Beta Gamma '20
Kyle Brace, Theta '22
Daniel Campagna, Psi Beta '20
Anthony Crawley, Eta '22
Jacob DeCastro, Nu '21
Dillon Duttera, Iota '21
Nicholas Guerriero, Xi Alpha '21
Ben Lovera, Xi Alpha '21
Patrick Magnuszewski, Xi Alpha '21
Jonathan Marquina, Iota '21
Gerald McKim, Xi Alpha '21
Tyler A. Morris, Gamma Gamma '21
Daniel Mortati, Iota '21
William C. Pelfrey, Pi Alpha '20
Connor Prima, Theta '21
John Salvas, Theta '21
Colin Schuman, Iota Gamma '22
Cameron J. Shake, Epsilon '22
Ian Shaw, Omega Alpha '22
Matthew L. Simmers, Beta Gamma '21
Alexander M. Stone, Psi Alpha '21
Ryan P. Storm, Epsilon '22
Suhas Suddala, Phi Beta '22
Tyler Van Burk, Lambda Beta '21
Hongyu Wang, Iota '20
Christopher M. Yost, Pi Alpha '22
Thomas Yu, Beta '21
Rafal Zdanowicz, Eta '20

SPRING 2019

Kirk Amiaga, The College of NJ '21
Trevor Bell, The College of NJ '22
Nicholas Blount, The College of NJ '22
Thomas Bradbury, Iota Gamma '22
Jamie Bregman, Xi Alpha '22
Jeffrey Brown, The College of NJ '22
Jared Chimento, The College of NJ '22
Marc Colavita, Xi Alpha '22
Maximillian D'Amato, The College of NJ '22
Michael Erickson, The College of NJ '22
Ryley C. Escobar, Epsilon Beta '22
Charlie Ferguson, Kappa '22
Sohan Gadiraju, Alpha Beta '23
Jack Hardzewicz, The College of NJ '22
Frederick Hayeck, The College of NJ '22
Devin T. Jackson, Beta Gamma '22
Arihant Jain, Eta '21
Edmund Lin, Omega Alpha '22
Elmer Nalevanko, Eta Beta '22
Michael Neil, Kappa '22
Brooks Nieberding, Kappa '23
Allan B. Pedin, Beta Gamma '21
Serhat Sakarcan, Xi Alpha '22
Tyler Snyder, Omega '22
Ryan Talley, Kappa '21
Tyler M. Weldy, Beta Gamma '22

"The Foundation fully supports the creation and endowment of new scholarships."

NU ALPHA SCHOLARSHIP RECIPIENTS

FALL 2018

Dennis P. Barba '19
Isaiah Fisher '19
Daniel Herman '21
Jake Klores '21
William Matheson '19
Andrew Panayiotou '20
John Robertson '21
John Sica '19
Michael S. Smith '20
Patrick I. Tape '20
Daniel Terrell '21

SPRING 2019

Luke Bolster '21
Shane Brett '19
Patrick Healy '22
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HISTORY OF THE NU ALPHA SCHOLARSHIPS

In 2010, Brother Andy Barth, Nu Alpha '83 approached the KDR Foundation. He wanted to support his undergraduate chapter at Columbia University by providing scholarships for their new members who received a grade point average above a 3.0 during their new member process, and initiated Brothers who are active within the chapter and also obtains a 3.0 grade point average. The first round of scholarships was provided in the 2011 Spring semester. Since then, because of Brother Barth's generosity, scholarships totaling $214,450 have been provided to more than 90 undergraduate Brothers.

Brother Andy Barth, Nu Alpha '83

The Heritage Society

The Heritage Society is a group of devoted alumni worldwide who have made the Foundation a beneficiary of their estate plan.

ALOK KAPOOR,
IOTA BETA '93

Like many of you reading this, KDR has had a much more significant impact in my life than I could ever have imagined in my college years, and as I've grown older, I've felt compelled in some small way to give back by "paying it forward". I've done that off and on in small ways over the years through targeted giving and even some volunteer work, but never the "big step" of KDR's Heritage Society.

I always thought I'd get around to it eventually – but frankly the idea of opening up our estate plan and engaging an attorney to do so wasn't at the top of my priorities. So the idea sat on the backburner until a recent conversation my wife and I were having with our financial advisor. In the conversation we discussed the idea of organizations that matter to us, like Kappa Delta Rho, and how there ought to be an easier way to support planned giving than opening up our estate plan. And he said, "There is!"

That's when we discussed ideas like adjusting beneficiaries on our retirement accounts or even life insurance as a relatively easy way to incorporate these wishes into our estate plans. And, to my surprise, I found it truly is simple. Within a few clicks I was able to add Kappa Delta Rho Foundation as a beneficiary on my Fidelity Retirement Account, print out a form, sign with my wife, and submit!

We are pleased to do our small part in helping ensure the lasting legacy of this great organization so it can benefit generations to come.

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You have a once-in-a-lifetime opportunity, through your estate plans, to change the national fraternity landscape.

Is your estate plan complete?

- Do you have a current will?
- Have you executed a durable power of attorney to provide for the management of your affairs if you become incapacitated?
- Have you executed a living will, setting forth your wishes about medical treatment?
- Have you reviewed beneficiary designations of your life insurance policies and retirement accounts to make sure they reflect your current wishes?
- Have your included in your estate plan a legacy gift for the Kappa Delta Rho Foundation or other charitable organizations that have been important in your life?

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Brother Jim Hubbard, Psi '66 with his wife Sharon taking a moment to catch up with Brother Bobby McCormick, Eta '79 at the 2018 Awards Banquet at the 2018 National Convention.

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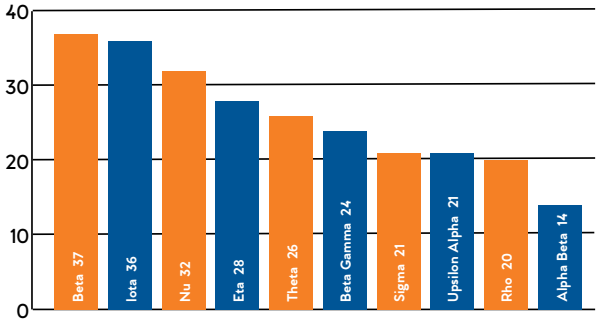

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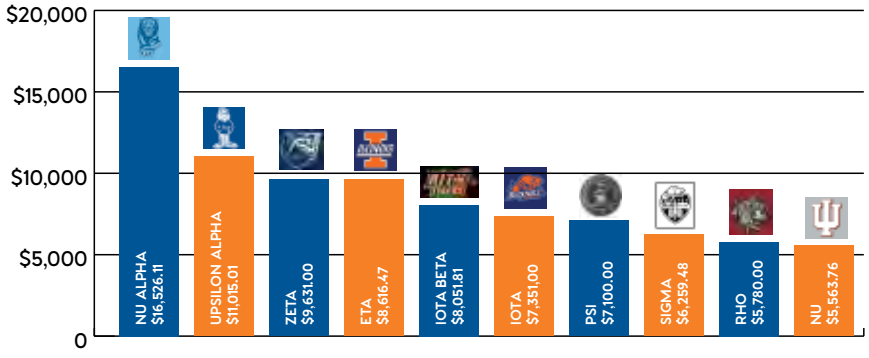

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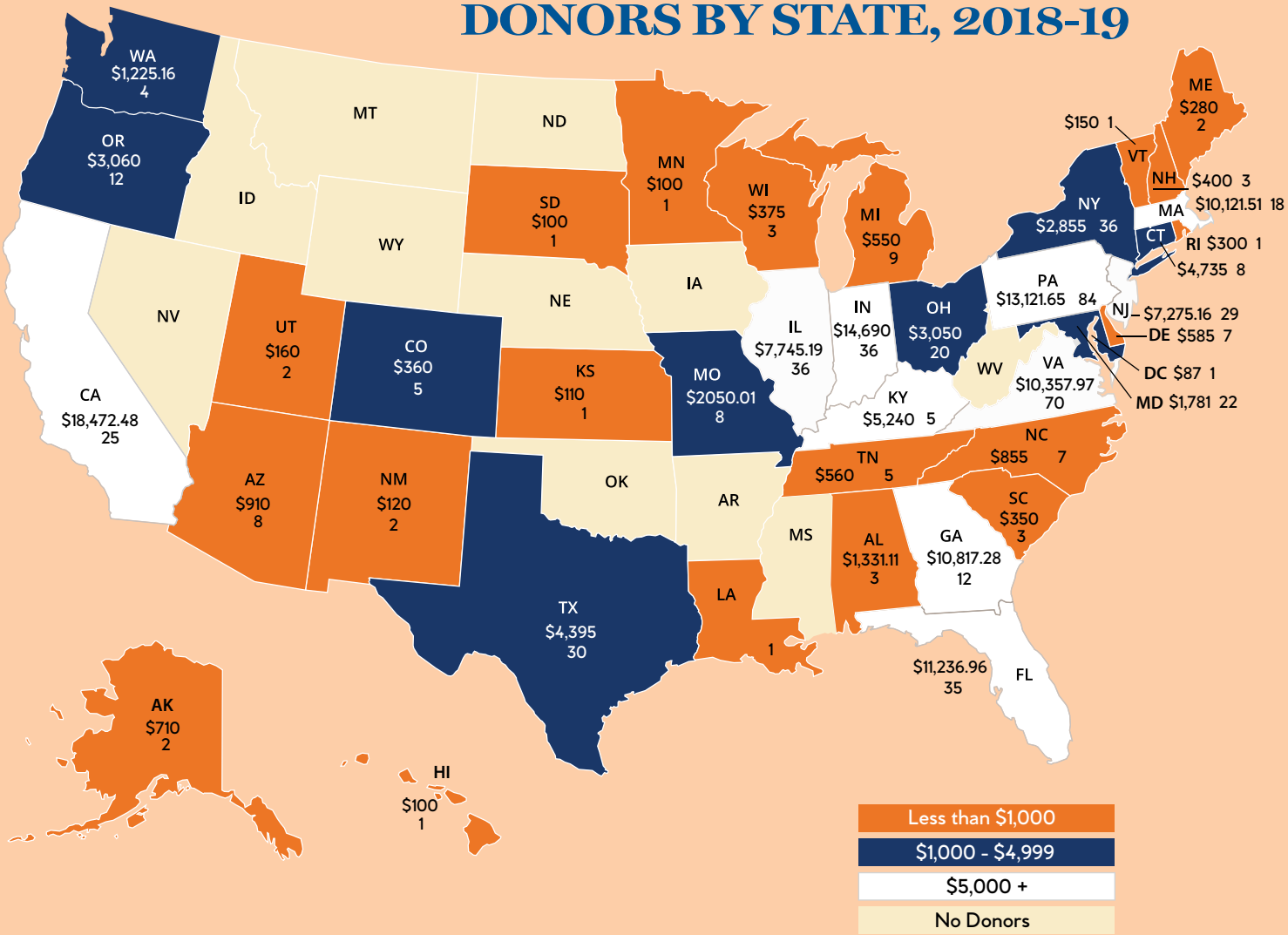
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