

THE AMERICAN LEGION

LEGACY

SCHOLARSHIP

2019 ANNUAL REPORT

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American Legion Legacy Scholarship recipient Rosa-Maria Valdes at her college campus in Manchester, N.H., on Thursday, Jan. 9, 2020. Photo by Gabe Souza

Program Overview

Since Sept. 11, 2001, the United States has lost nearly 7,000 citizen soldiers in Operations Enduring Freedom, Iraqi Freedom, New Dawn, Inherent Resolve, Freedom's Sentinel and various other Global War on Terror operations. Additionally, over 52,800 servicemembers have been wounded during those operations. As a result of such valiant service and sacrifice, those servicemembers' families are left to pick up the emotional, spiritual and financial pieces of their lives.

Through its Legacy Scholarship, created in 2002, The American Legion has been helping to provide higher education for children of servicemen and women who have made the ultimate sacrifice while serving on active duty on or after 9/11. However, the financial impact of The American Legion Legacy Scholarship steadily diminished due to a much greater availability of federal educational benefits available to children of fallen servicemembers, most notably government funding of the Marine Gunnery Sergeant John David Fry Scholarship, along with greater availability of state and local educational benefits, thereby fulfilling the vast majority of their education costs.

While continuing to recognize the sacrifice of children of the fallen as first priority, Resolution No. 1 at the 2016 Spring Meetings of The American Legion National Executive Committee further recognized the significant dedication and sacrifice of servicemembers injured while serving on active duty on or after 9/11. Resolution No. 1 enhanced The American Legion Legacy Scholarship:

- Expanding the scholarship's eligibility requirements to include children of post-9/11 veterans who have been assigned a combined Department of Veterans Affairs (VA) disability rating of 50 percent or greater;
- Adapting the previously merit-based scholarship program to that of a needs-based scholarship, whereby a financial gap remaining after all federal and state grants and scholarships available to an eligible applicant having first been applied may be bridged up to \$20,000 annually and;
- Increasing the total amount of financial aid available to award.

The principal amount of the fund remains intact from year-to-year. Effective in 2017, the strategy for establishing a maximum amount of allotted funds that may be awarded per annum is that half (50 percent) of the annual trust fund income earned plus half (50 percent) of monies fundraised for The American Legion Legacy Scholarship Fund during a calendar year. This total is made available the following year to award as individual needs-based scholarships, with any allotted funds not awarded at the end of the year then returned to the trust fund for continued growth. The other half (50 percent) of monies fundraised during a calendar year for The American Legion Legacy Scholarship are automatically be invested into the trust fund for continued growth.

Scholarships are for undergraduate or graduate levels of study at an accredited institution of higher education within the United States. Those eligible to apply for the scholarship are the biological children, legally adopted children, child of a spouse by a prior marriage, or dependent child of active duty U.S. military, National Guard and military reservists who were federalized and died on active duty on or after Sept. 11, 2001, or are children of a post-9/11 veteran having been assigned a combined disability rating of 50 percent or greater by the VA.

The National Finance Commission oversees and manages the Legacy Scholarship Fund. The guidelines for selection of scholarship recipients and the amount of money awarded to each recipient resides with the national Americanism Commission, which in turn delegates the administrative duties to the National Committee on Youth Education.

To learn who has received an American Legion Legacy Scholarship, you may contact your department headquarters. The scholarship application is online at www.legion.org/scholarships/legacy, along with further information about the scholarship and testimonials of recipients.

For additional information about the Legacy Scholarship, email scholarships@legion.org or call (317) 630-1203. For questions regarding fundraising, donations or donation acknowledgement, please email donorservices@legion.org



Legacy Scholarship recipient Hannah Ramos of Romeoville, Ill., with her parents Lisa and Bernard Ramos at the closing ceremony at Post 64 in Indianapolis on Thursday, Aug. 22, 2019. Photo by Ben Mikesell

**NATIONAL EXECUTIVE COMMITTEE
OF
THE AMERICAN LEGION
INDIANAPOLIS, INDIANA
MAY 4-5, 2016**

**Resolution No. 1: American Legion Legacy Scholarship Enhancement
Origin: Committee on Youth Education
Submitted By: Finance Commission
(As amended)**

WHEREAS, Resolution No. 2 of the National Executive Committee, October 2001, entitled *The American Legion September 11 Memorial Scholarship* authorized the establishment of said scholarship in memory of our military men and women who died while serving on active duty on or after September 11, 2001 (hereafter referred to as “Post-9/11”); and

WHEREAS, Resolution No. 20 of the National Executive Committee, May 2002, entitled *The American Legion September 11 Memorial Scholarship Trust Fund* authorized the establishment of said trust fund, under the same name, at the Hoosier Trust Company to fund a scholarship program for children of those members of U.S. Armed Forces who died while serving on active duty on or after September 11, 2001; and

WHEREAS, Resolution No. 16 of the National Executive Committee, May 2003, entitled *Clarification of Purpose, The American Legion September 11 Memorial Scholarship* allowed the scholarship to also be known as the American Legacy Scholarship; and

WHEREAS, Resolution No. 31 of the National Executive Committee, May 2005, entitled *Amend Rules and Conditions For Administration Of The American Legacy Scholarship Program* clarified eligibility to apply and rules and conditions for administration of the scholarship program; and

WHEREAS, The American Legion Riders have been the most dedicated fundraiser and supporter of the American Legion Legacy Scholarship, participating in the annual American Legion Legacy Run that has grown in success each year with an excess of one million dollars raised in both 2014 and 2015; and

WHEREAS, By resolution the fund is also known as the American Legacy Scholarship, however, referring to the scholarship as The American Legion Legacy Scholarship for marketing, promotion and fundraising purposes and related materials establishes clear branding for the organization; and

WHEREAS, The impact of the American Legion Legacy Scholarship has been diminishing in the past five years due to a much greater availability of federal educational benefits that are evolving for children of fallen service members, most notably Public Law 111-32 which created the Marine Gunnery Sergeant John David Fry Scholarship, along with greater availability of state and local educational benefits, thereby fulfilling the vast majority of their education costs; and

WHEREAS, Those service members having been injured in the line of duty while serving on active duty have demonstrated dedication and sacrifice for their nation; and

WHEREAS, A disability rating assigned by the Department of Veterans Affairs (VA) of fifty-percent (50%) indicates a potential loss of income by fifty-percent (50%) for labor intensive employment, shows significant disability, and a veteran may not be able to earn a high enough income to save for college; and

WHEREAS, A disability rating assigned by the VA of fifty-percent (50%) is considered serious disability that allows VA medical care of all conditions; and

WHEREAS, The Veterans Affairs & Rehabilitation (VA&R) Division of National Headquarters relates there are 1,712,236 veterans who have been assigned a disability rating of fifty-percent (50%) or greater by the VA, although there is no breakdown by war era available; and

WHEREAS, There is opportunity to enhance the relevance of the American Legion Legacy Scholarship by providing educational assistance to children of Post-9/11 veterans having been assigned a disability rating by the VA; and

WHEREAS, Enhancing the current merit-based American Legion Legacy Scholarship program to that of a needs-based educational scholarship program can allow for providing more equitable benefit among eligible beneficiaries; and

WHEREAS, It is incumbent upon The American Legion to ensure the legal requirements for distribution of the trust fund are met and the trust fund be preserved as a public charity; and

WHEREAS, Enhancing the current American Legion Legacy Scholarship program to reflect an expansion of eligibility and relevance will benefit a larger pool of beneficiaries, is more relative to the beneficiaries, and reinforces the organization's renowned reputation as the nation's premier veterans service organization; and

WHEREAS, Enhancing the current American Legion Legacy Scholarship program can still allow for growth and long-term sustainability of the existing trust fund; and

WHEREAS, The Committee on Youth Education, the Americanism, Internal Affairs and Finance Commissions each have approved this resolution and recommend it to the National Executive Committee for its favorable action; now, therefore, be it

RESOLVED, By the National Executive Committee of The American Legion in regular meeting assembled in Indianapolis, Indiana, on May 4-5, 2016, That the American Legacy Scholarship trust will continue to provide educational benefits to those children of military servicemembers who have died while serving on active duty on or since September 11, 2001, (hereafter referred to as "Post-9/11"); and, be it further

RESOLVED, That effective in 2017 the scope of American Legacy Scholarship trust eligibility will be further enhanced by establishing conditions to allow awarding education benefits to children of Post-9/11 veterans having been assigned a disability rating by the Department of Veterans Affairs (VA) of at least fifty-percent (50%); and, be it further

RESOLVED, That effective in 2017 the American Legion Legacy Scholarship will be enhanced from the current merit-based scholarship program to that of a needs-based scholarship whereby the program will serve to fulfill a financial gap remaining after all federal and state grants/scholarships available to an eligible applicant have first been sought, with the gap fulfillment not to exceed \$20,000 within a calendar year per applicant; and, be it further

RESOLVED, That the American Legion Legacy Scholarship program will annually prioritize distribution of allotted funds to those eligible applicants demonstrating the greatest financial need, with top priority consideration first given to children of fallen Post-9/11 servicemembers, then secondly to children of Post-9/11 veterans having been assigned a disability rating by the VA of at least fifty-percent (50%), until such allotted funds are exhausted; and, be it further

RESOLVED, That the strategy for establishing a maximum amount of allotted funds that may be awarded per annum will be that half (50%) of the annual trust fund income earned plus half (50%) of monies fundraised for the American Legacy Scholarship trust during a calendar year will be made available the following year to award as individual needs-based scholarships, with any allotted funds not awarded at the end of the year then returned the trust fund for continued growth; and, be it further

RESOLVED, That the other half (50%) of monies fundraised during a calendar year for the American Legacy Scholarship trust will automatically be invested into the trust fund for continued growth; and, be it further

RESOLVED, That the above distribution formula and/or individual scholarship maximum may be changed with concurrence of the Finance Commission and approval of the National Executive Committee; and, be it further

RESOLVED, That the Americanism Commission will determine, establish in writing, and review annually thereafter, all other conditions, rules, guidelines and procedures for the American Legion Legacy Scholarship program so as to attain maximum equity and efficiency for the eligibility, application, selection, award and disbursement processes; and, be it further

RESOLVED, That the existing trust fund from which monies are issued will maintain the legal title The American Legion September 11 Memorial Scholarship Trust Fund, which is also referred to as the American Legacy Scholarship; and, be it further

RESOLVED, That the title The American Legion Legacy Scholarship will be used for marketing, promotion and fundraising efforts and related materials so as to promote brand awareness and help alleviate confusion with other funds/scholarship programs associated with the September 11, 2001, attack on America; and, be it further

RESOLVED, That the Americanism Commission will be responsible for the awarding and administration of scholarships and will report same through the Finance Commission to the National Executive Committee at its annual May meetings; and, be it further

RESOLVED, That the Americanism Commission will maintain an accounting of work hours, wages, and expenses associated with administration and promotion of the American Legion Legacy Scholarship to further include in the annual report through the Finance Commission to the National Executive Committee at May meetings; and, be it further

RESOLVED, That to provide for the expenses associated with the promotion of the American Legacy Scholarship trust, an amount not to exceed five percent (5%) of the income earned for the trust may be allocated annually; and, be it further

RESOLVED, That the national judge advocate and national treasurer shall cooperate in the drafting of the appropriate amendment to The American Legion September 11 Memorial Scholarship Trust, as originally established in Resolution No. 20 of the National Executive Committee, May 2002, titled The American Legion September 11 Memorial Scholarship Trust Fund; and, be it further

RESOLVED, That the national commander, after review and approval by the national judge advocate for legal sufficiency, be and is hereby authorized and directed to execute all appropriate contracts, trust indentures and documents to accomplish the purpose of this resolution and the national adjutant be and is hereby authorized and directed to attest to the same; and, be it finally

RESOLVED, That the following resolutions: Resolution No. 2 of the National Executive Committee, October 2001, titled *The American Legion September 11 Memorial Scholarship*; Resolution No. 16 of the National Executive Committee, May 2003, titled *Clarification of Purpose, The American Legion September 11 Memorial Scholarship*; Resolution No. 31 of the National Executive Committee, May 2005, titled *Amend Rules and Conditions for Administration of the American Legacy Scholarship Program*, are hereby superseded and rescinded.

Award History

Year	Amount Awarded
2004	\$2,000 – 1
2005	\$6,000 – 3 (\$2,000 each)
2006	\$30,000 – 6 (\$5,000 each)
2007	\$36,000 – 8 (\$4,500 each)
2008	\$35,970 – 11 (\$3,270 each)
2009	\$36,000 – 16 (\$2,250 each)
2010	\$46,000 – 13 (10-\$4,000/3-\$2,000)
2011	\$49,975 – 23 (21-\$2,275/2-\$1,100)
2012	\$49,950 – 18 (\$2,775 each)
2013	\$49,980 – 28 (\$1,785 each)
2014	\$49,250 – 23 (21-\$2,250/2-\$1,000)
2015	\$51,584 – 32 (\$1,612 each)
2016	\$49,972 – 31 (\$1,612 each)
2017	\$671,892 – 55 (between \$586 and \$20,000 each)
2018	\$744,436 – 41 (between \$1,770 and \$20,000 each)
2019	\$1,122,624 – 57 (between \$2,298 and \$20,000 each)
Total awarded	\$3,031,633
Total scholarships awarded	366

Legacy Run Fundraising History*

Year	Amount Raised	Convention Host
2006	\$179,000	Salt Lake City
2007	\$326,000	Reno, Nev.
2008	\$457,000	Phoenix
2009	\$523,299	Louisville, Ky.
2010	\$634,000	Milwaukee
2011	\$668,738	Minneapolis
2012	\$724,524	Indianapolis
2013	\$764,034	Houston
2014	\$861,791	Charlotte, N.C.
2015	\$1,156,019	Baltimore
2016	\$1,301,210	Cincinnati
2017	\$1,270,830	Reno, Nev.
2018	\$1,300,805	Minneapolis
2019	\$1,028,643	Indianapolis

*A Legacy Run year begins Oct. 1, and concludes Sept. 30, of the following year.

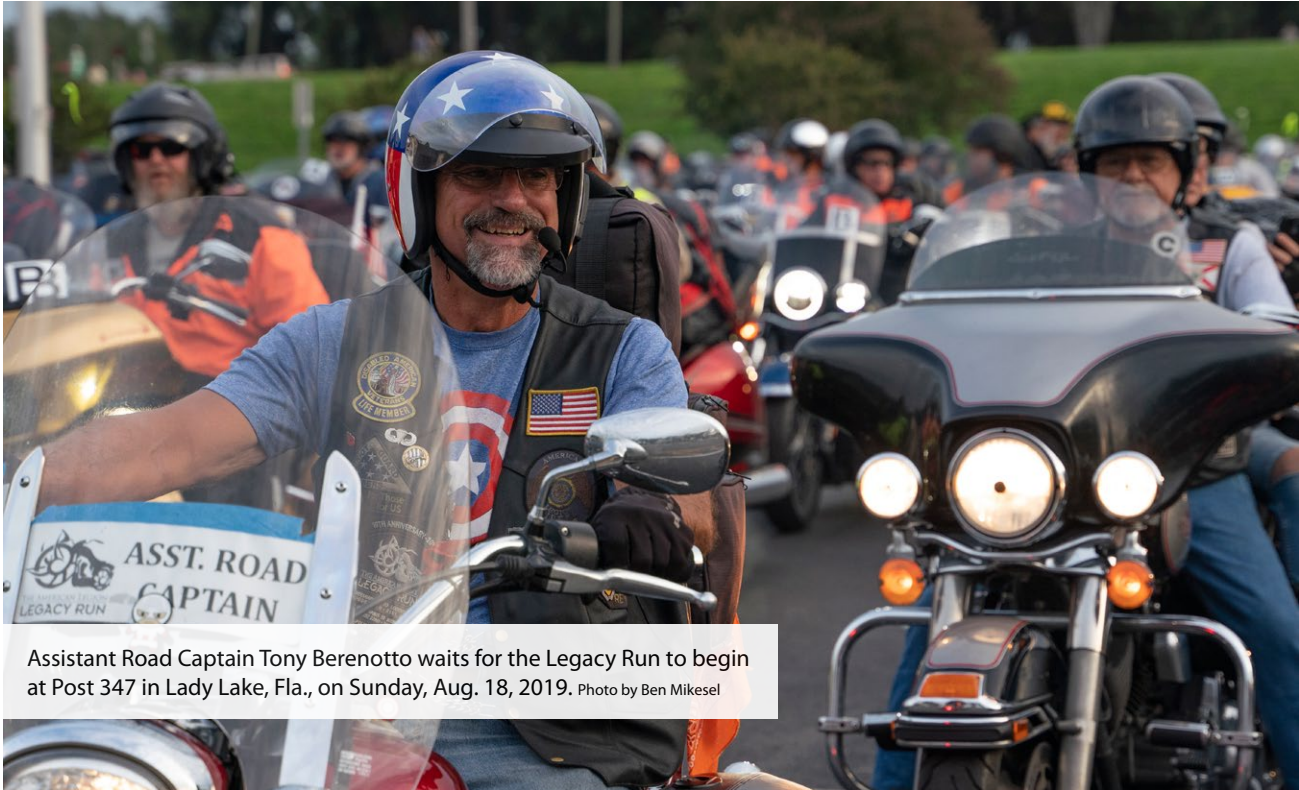
Legacy Fund 2019 Calendar Year Donations

\$1,046,603

Legacy Fund Balance as of 12-31-2019

\$15,391,936

The Americanism Commission wishes to extend its sincerest appreciation to the entire American Legion Family and all generous contributors to The American Legion Legacy Scholarship Fund. Special acknowledgement is extended to the American Legion Riders for their resounding and continued fundraising success through the annual American Legion Legacy Run.



Assistant Road Captain Tony Berenotto waits for the Legacy Run to begin at Post 347 in Lady Lake, Fla., on Sunday, Aug. 18, 2019. Photo by Ben Mikesel

Talking points to encourage continued support of The American Legion Legacy Scholarship

No amount of money will ever repay our indebtedness to those who made the ultimate sacrifice and to those who have endured disabling conditions while serving to protect our continued freedom. Still, we honor their service and legacy by helping support the education of their children. The American Legion Legacy Scholarship seeks to bridge the financial aid gap for children of the fallen and those assigned a combined VA disability rating of 50 percent or greater

The following are a few talking points to encourage continued support of this scholarship:

- It's a financially sound investment as donations have increased every year since inception, and the fund's principle is protected to ensure a continued, upward market value.
- As the value of the investment increases through contributions, enhanced opportunities for the amount of awards, the amount of money awarded, and the number of recipients rises.
- Eligible applicants are deserving of assistance as assessed by their financial need and their parent's service and sacrifice for our country. Many recipients say that without the Legacy Scholarship they would not be able to afford college or be forced to work part-time jobs while attending classes.

Department and Award Breakdown

Year	Awards	Department
2004	1	Florida
2005	3	Illinois (2), Washington
2006	5	California, Illinois, Michigan, North Carolina, Texas
2007	4	California, Kansas, Tennessee, West Virginia
2008	7	Connecticut, Kansas, Maryland, Michigan, North Carolina, Ohio, Washington
2009	5	Georgia, Hawaii, Illinois, Minnesota, Ohio
2010	5	Alabama, Massachusetts, Michigan, Mississippi, Oregon
2011	15	California (2), Georgia, Illinois, Massachusetts, Michigan (2), Minnesota, Ohio, Tennessee, Texas, Virginia, Washington (2), West Virginia
2012	9	California (3), Georgia, Michigan, Pennsylvania, Washington, Wisconsin, France
2013	18	California, Florida, Georgia (3), Iowa, Kansas, Kentucky (2), Massachusetts, Michigan, New York (3), Tennessee, Texas, Virginia, Wisconsin
2014	7	California, Kentucky, Michigan, North Carolina, New York (2), Wisconsin
2015	17	Alaska, Arkansas, California, Illinois (2), Iowa, Kentucky, Michigan, Ohio (2), Oklahoma, Oregon, Pennsylvania, South Carolina, Texas, Virginia (2)
2016	17	California, Florida, Hawaii, Kansas (3), Maryland, Michigan, New York, North Carolina (3), South Carolina, Tennessee (2), Texas, Washington
2017	55	Alaska, Arizona, California (2), Colorado (4), Florida (4), Georgia (2), Illinois, Indiana (2), Kansas, Kentucky (2), Massachusetts, Maryland (2), Montana, North Carolina (5), Nebraska (2), New York (3), Ohio (3), Pennsylvania (2), South Carolina (2), Tennessee, Texas (9), Virginia (3), Washington
2018	41	Alabama, California (4), Florida (3), Georgia (4), Hawaii, Iowa, Illinois (2), Louisiana (2), Massachusetts (2), Minnesota, North Carolina, New Hampshire, New York, Oklahoma, Pennsylvania (3), South Carolina, Tennessee, Texas (4), Virginia (3), Washington, Wisconsin (2), West Virginia
2019	57	Arizona, Arkansas (2), California (6), Connecticut (2), Florida (3), Georgia (4), Hawaii, Illinois (3), Kansas (2), Kentucky, Maine, Maryland, Massachusetts, Mississippi, Nebraska, New Mexico, New York (4), North Carolina (3), Ohio, Oklahoma (2), Oregon, Pennsylvania (3), South Carolina, South Dakota, Tennessee, Texas (6), Virginia, Wisconsin (2)



THE AMERICAN LEGION

700 N. Pennsylvania Ave.
Indianapolis, IN 46204

(317) 630-1203

americanism@legion.org

 [**legion.org**](http://legion.org)