

ENDOWMENT ANNUAL REPORT 2024





SCA ENDOWMENT

Dear Colleagues,

As the SCA Endowment Council Chair, I am reaching out to share with you the pivotal role our endowment plays in the continued success and growth of our society. The support from so many members has been invaluable. Following is the 2025 update on the endowment, illustrating the significant impact on our mission to foster research and leadership.

The Role of the Endowment

The endowment is the backbone of our Society’s long-term sustainability. A carefully managed portfolio ensures that we will weather financial challenges, plan for the future, and continue to deliver on our promise of academic excellence. The funds generated from the endowment are used to support a wide range of priorities, from research programs to awards.

Our endowment supports the Society today and provides a legacy for future generations of students and scholars. It is a vital resource that enables us to remain competitive, innovative, and responsive to the evolving needs of cardiac anesthesia.

Your Continued Support

As we look ahead to the future, there is still much to be done. To ensure the continued success and to create even more opportunities, we ask for your continued support. A gift to the endowment is an investment in the future of our specialty—an investment that yields lasting benefits for generations to come.

Whether you contribute today, are considering a planned gift, or want to direct your support to a specific area within the endowment, your generosity will make an immediate and meaningful impact.

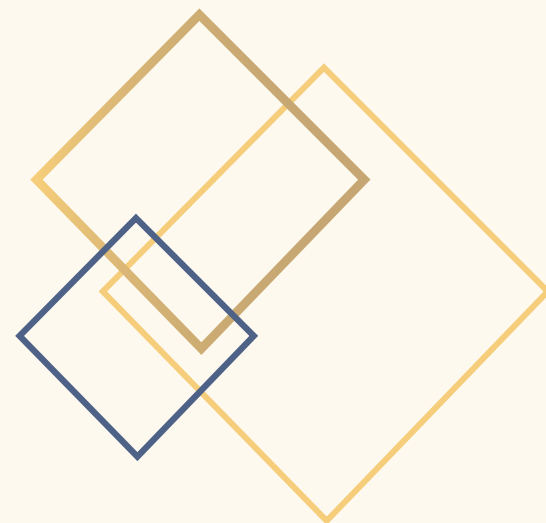
To learn about different giving opportunities or discuss how you can support the endowment, please contact me or a SCA team member. Your support is truly transformative, and we are grateful for your continued partnership.

Thank you for being such an integral part of our success.

Warm regards,

Isobel Russell
Chair, Endowment Council
Society of Cardiovascular Anesthesiologists
belrussell@me.com

SCA Office
1-855-658-2828
donations@scahq.org



ABOUT THE SCA ENDOWMENT FUND

The Society of Cardiovascular Anesthesiologists (SCA) Endowment Fund, created by Members and the Board of Directors, accepts gifts of all sizes to fund programs, projects, and services that advance SCA’s mission, supports SCA members and improves patient care.

SCA Endowment Fund supports cutting edge research, educational programs, and the development of resources that enhance patient care.

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Modera Wealth is grateful to have
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SCA Endowment Council Would Like To Thank Our Contributors

Cumulative Giving as of March 31, 2025

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KAPLAN LEADERSHIP DEVELOPMENT AWARD

The Kaplan Leadership Development Award is sponsored by the SCA Endowment for SCA members. The mission of this award is to assist cardiothoracic and vascular anesthesiologists in their careers by granting funding to further their focus on leadership opportunities and development through course work and leadership specific studies.

AWARD WINNERS

2025 Nadia Hensley, MD Johns Hopkins University School of Medicine	2018 Michael Grant, MD Johns Hopkins University School of Medicine
2025 Regina Linganna, MD University of Pennsylvania	2017 Rebecca M. Gerlach, MD, FRCPC Clinic University of Chicago
2024 Sarah Cotter, MD Duke University School Medical Center	2016 James D. O'Leary, MBBCh, MD, MMED, FCARSCI University of Toronto
2024 Ashley P. Oliver, MD, MA University of California, Los Angeles	2015 Andrew L Wilkey, MD Northwest Anesthesia
2023 Sergey Karamnov, MD Brigham and Women's Hospital	2014 Tjorvi Perry, MD Northwest Anesthesia
2022 Sheela Pai Cole, MD, FASE, FASA Stanford University	2014 Amanda Rhee, MD The Icahn School of Medicine at Mount Sinai
2022 Stephanie Ibekwe, MD, MPH, MS Baylor College of Medicine	2014 Bryan Maxwell, MD, MPH Johns Hopkins University School of Medicine
2021 Karsten Bartels, MD, PhD University of Nebraska Medical Center	2013 Kelly Ural, MD Ochsner Clinical Foundation
2020 Lisa Rong, MD Weill Cornell Medicine	2012 Sasha K. Shillcutt, MD, FASE University of Nebraska Medical Center
2019 Ruma Bose, MD Beth Israel Deaconess Medical Center	2012 Dalia A. Banks, MD UCSD
2019 Danny Muehlschlegel, MD MMSc Brigham and Women's Hospital	
2018 Anne Cherry, MD Duke University School of Medicine	

RESEARCH GRANT AWARDEES 2008-2024

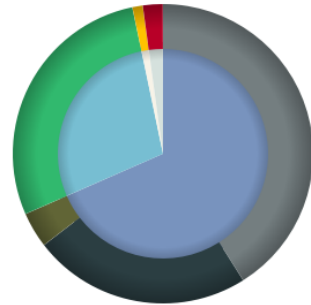
YEAR	NAME	GRANT TYPE	YEAR	NAME	GRANT TYPE
2024	Sungsoo (Danny) Kim, MD	In-Training	2015	Matthew Levin, MD	Starter
2024	Serena Dasani, MD	In-Training	2015	Quintin Quinones, MD	Starter
2024	Megan Rolfzen, MD	In-Training	2015	Elod Szabo, MD	Mid-Career
2024	Mark Robitaille, MD	Starter			
2024	Nadia Hensley, MD	Mid-Career	2014	Domagoj Mladinov, MD	In-Training
			2014	Kimberly Howard-Quijano, MD	Starter
2023	Luai Zakaria, MD	In-Training	2014	Bryan Maxwell, MD	Starter
2023	Terri Sun, MD	Starter/Diversity & Inclusion	2014	David McIlroy, MD	Mid-Career
			2014	Keierick Togashi, MD	Roizen
2023	Tiffany Williams, MD	Starter/Diversity & Inclusion			
2023	Lee Goeddel, MD	Mid-Career	2013	Geoffry Lively, MD	In-Training
			2013	Michael Manning, MD	Starter
2022	Kofi Vanduyck, MD	Diversity & Inclusion	2013	Robert Thiele, MD	Starter
2022	Yafen Liang, MD	Mid-Career	2013	Nina Hauck-Weber, MD	Mid-Career
			2012	Friederike Behmenburg, MD	Starter
2021	Sergey Karamnov, MD	Starter	2012	Tobias Piegeler, MD	Starter
2021	Elena Ashikhmina, MD	Diversity & Inclusion	2012	Amanda Fox, MD	Mid-Career
			2012	Se-Chan Kim, MD	Roizen
2021	Alina Nicoara, MD	Mid-Career			
2021	Marta Kelava, MD	MICOR	2011	Jayant Nick Pratap, MD	Starter
			2011	Jan Stumpner, MD	Starter
2020	Matthew Barajas, MD	Starter	2011	Diederik Van Dijk, MD	Mid-Career
2020	Isaac Wu, MD	Starter			
2020	Mike Mazzeffi, MD	Mid-Career	2010	Timo Brandenburger, MD	Starter
			2010	Tetsuro Sakai, MD	Starter
2019	Nathan Clendenen, MD	Starter	2010	Gregory Hare, MD	Mid-Career
2019	Jessica Brodt, MD	Mid-Career	2010	Joern Karhausen, MD	Roizen
2018	Erik Strauss, MD	Starter	2009	Martina Nowak-Machen, MD	Starter
2018	Jochen Steppan, MD	Mid-Career	2009	Mark Lovich, MD	Starter
			2009	Qing Ma, MD	Mid-Career
2017	Eckhard Mauermann, MD	Starter	2009	Matthias Riess, MD	Roizen
2017	Louis Saddic, MD	Starter			
2017	Viachaslau Barodka, MD	Mid-Career	2008	Zhengyuan Xia, MD	Starter
			2008	J. Danny Muehlschlegel, MD	Starter
2016	Jan Dieleman, MD	Starter	2008	Ragnar Huhn, MD	Starter
2016	Matthew Fischer, MD	Starter	2008	Mark Gerhardt, MD	Mid-Career
2016	Michael Mazzeffi, MD	Starter			
2016	Srdjan Jelacic, MD	Roizen			

PORTFOLIO REVIEW

as of 12/31/2024



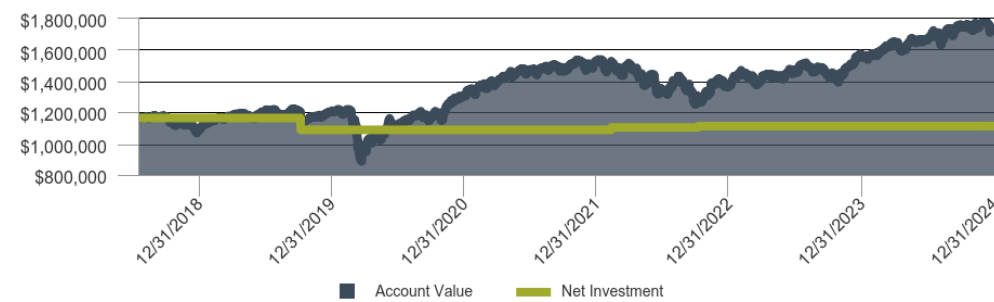
Asset Allocation



Asset Category : Asset Class	Current Value	Current Percent
Equity	\$1,180,979.98	68.4%
U.S. Equities	\$708,488.30	41.0%
International Equities	\$406,011.51	23.5%
Real Estate	\$66,480.17	3.9%
Fixed Income	\$488,498.25	28.3%
Core Fixed Income	\$488,498.25	28.3%
Cash	\$19,295.35	1.1%
Cash	\$19,295.35	1.1%
Other	\$37,167.32	2.2%
Total	\$1,725,940.90	100.0%

Portfolio Overview

Invested Value Comparison



Performance Summary

	Rolling 1 Year	Rolling 5 Years	Inception to Date (7/18/2018)
Beginning Value	\$1,570,672.42	\$1,204,512.39	\$0.00
Net Flows	\$660.00	\$24,160.00	\$1,113,063.89
Ending Value	\$1,725,940.90	\$1,725,940.90	\$1,725,940.90
Investment Gain	\$154,608.48	\$497,268.51	\$612,877.01
Net TWR	9.8%	7.1%	7.1%
Bloomberg US Aggregate	1.3%	(0.3%)	1.3%
S&P 500 Composite	25.0%	14.5%	14.0%
Russell 2000	11.5%	7.4%	5.8%
MSCI EAFE (TR) Gross	4.3%	5.2%	5.2%
Dow Jones Total Market US Real Estate	4.9%	3.0%	5.6%
Bloomberg Commodity	5.4%	6.8%	5.3%

Returns for periods exceeding 12 months are annualized.

The performance results have been compiled solely by Modera Wealth Management, LLC from sources deemed reliable, including your account custodian, but have not been independently verified. The statements you receive from your account custodian are the official record of your account. Modera Wealth Management, LLC encourages you to compare and verify the information on this statement with the information on the statements you receive from your account custodian.

LETTER OF INTENT FOR AN ESTATE GIFT TO SCA ENDOWMENT FUND

I/We wish to support the future well-being of SCA Endowment Fund through a planned gift, and with this letter we are informing the society of my/our plans. I/We have made a provision of this legacy gift for the SCA Endowment Fund through a:

- Charitable Bequest in a Will or Living Trust
- Individual Retirement Plan (IRA)
- Life Insurance Designation
- Charitable Remainder Trust
- Charitable Gift Annuity
- Other
- Copy or excerpt of document enclosed (optional).

I/We wish to inform the SCA for its long-term planning purposes that the current value of my/our future gift is \$_____ (if a percentage of the estate, please state the approximate value). Providing this information is completely at your discretion and is kept in strict confidence. By stating an amount, your estate is not legally bound by this statement. There is no requirement to disclose, as a condition of membership in the Michael K Cahalan Legacy Circle but doing so will help the SCA better plan for its future.

We are very grateful for your thoughtful legacy gift!

SCA appreciates the opportunity to publicly acknowledge members of Michael K. Cahalan Legacy Circle but recognizes that estate plans are a highly personal matter. Only those members of the Michael K Cahalan Legacy Circle who give permission will have their names published in the donor listing. Please complete and return this form to let us know if, and how, you wish to be listed.

- Understanding that inclusion of my name in the Michael K. Cahalan Legacy Circle donor listings may encourage others to support SCA through their estate plans, I give permission for my name(s) to be published as follows:

(Please print name(s) as it should appear in the Legacy listing.)

- I prefer to keep my membership in the Michael K. Cahalan Legacy Circle confidential. Please do not publish my name.

We used the following professional advisor in creating this legacy gift:

 Name

 Firm

 Address

 City, State, Zip



DISCOVER YOUR GIVING PATH

Support the future of cardiovascular and thoracic anesthesiology through planned giving or by exploring a variety of donation options. By contributing to the SCA Endowment, making a legacy gift, or choosing from diverse options like stock gifts and IRA contributions, you ensure sustained support for our long-term mission. Discover the giving path that best suits your capability to contribute and make a lasting impact in the field of cardiovascular care.

Planned Giving

These gifts — or bequests — are donations that you designate in your will, estate, or trust. There is no minimum gift requirement, and the benefits are many. For example:

- Planned gifts afford you flexibility to provide for your family and support the SCA.
- Certain planned gifts may reduce estate or capital gains taxes.
- Planned gifts need not affect your cash flow during your lifetime.
- Certain types of planned gifts allow you to support the SCA while also providing income for the rest of your life — or a fixed income for a loved one.
- The joy of knowing that your legacy gift will sustain the SCA programs for years to come.

We are honored to work with you to develop a lasting gift to SCA. We have several gift methods to best align with your lifestyle.

Estate Gifts

As you create a plan for the future of your estate, consider naming the SCA in your living trust or including a bequest in your will. You can name either a specific amount or a percentage.

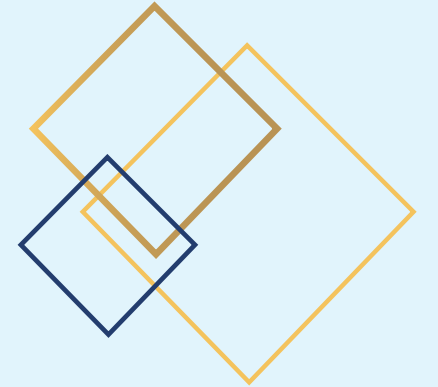
Life Insurance Beneficiary

When choosing a beneficiary for your Life Insurance Policy, consider naming the SCA. This option is especially convenient for our donors with paid-up policies that are no longer needed for family protection.

Retirement Plan

Qualified retirement plans can be left to the SCA. These assets are under less severe taxation when distributed to a charity rather than to an individual. Most IRA's, 403B's, and 401k's are accepted. You can also use your IRA during your lifetime to make donations. A Qualified Charitable Distribution, or QCD, is a method of charitable giving available to those 70 ½ years old or older and allows individuals to gift up to \$108,000 in 2025 from their IRA directly to the SCA.

SUPPORT THE SCA FOR RESEARCH, EDUCATION, AND PATIENT WELL-BEING.



The role of cardiovascular anesthesiologists is crucial in treating complex heart conditions and patients who are critically ill due to cardiovascular disease, especially as surgeries become more advanced and the population ages. The SCA leads globally in this field, advancing treatment through research, care, and knowledge. Your support helps fund critical research and education to improve patient care in cardiovascular disease.

SCA Endowment Foundation – Restricted

This fund is a restricted fund created in 2018 by the former SCA Foundation upon its dissolution. This fund was established to bestow to the SCA, in a Deed of Gift, the assets of the Foundation. Gifts to this fund are restricted and may only be used in accordance with the intent of the original Deed of Gift.

SCA Corporate Group – Unrestricted

This fund was created in 2024 by the Board of Directors to accept gifts of all sizes directed towards funding programs offered by the organization. These funds are unrestricted and may be used by the SCA to fund programs, projects, and services in advancing the mission of the organization.

Michael K. Cahalan Legacy Circle – Unrestricted (Research)

The SCA Endowment council is proud to present the ability to donate planned giving to a legacy circle named in honor of Michael K. Cahalan. Mike was instrumental in developing the forefront of cardiac anesthesia in the field of transesophageal echocardiography for both adult and pediatric cardiac surgery.

For more information about the SCA Endowment Fund, please visit the SCA website or contact SCA directly.

- Website: <https://scahq.org/endowment/>
- Email: info@scahq.org
- Phone: 855-658-2828



Scan Here to Support our SCA Endowment Efforts

