



The
Assistance
Fund

EXPANDING ACCESS FOR

Everyday Impact

2016 ANNUAL REPORT



Our Mission

To provide critically or chronically ill individuals with access to therapies through a continuum of services and programs, including education and financial aid. We envision the day when no person goes without medication due to an inability to pay.

PRESIDENT'S LETTER

Dear Friends,

In 2016 The Assistance Fund took its biggest step in removing barriers to medication access, launching eight new funds and providing relief to more than 23,000 patients. It was our most significant year of growth.

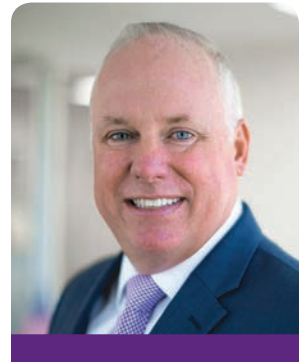
As we hear from the thousands of patients we serve and the donors who help us do it, we know we're making a difference. I'm proud of what we've accomplished, but our work never stops. We could not do it without the many people who make TAF's mission a reality – our donors, mission partners, patient advocates who answered nearly 120,000 calls this year, and other staff and the members of our boards.

Expanding access for everyday impact speaks to how our mission relates to the daily lives of patients. It means helping more patients suffering from different illnesses, living in more cities and states across the US, and with differing medication access needs.

We know that the need for what we do is growing. That's why we made major enhancements to our organization.

We're building out a world-class medical advisory board to ground us in the needs of patients and their families. In 2015, we welcomed our founding members Dr. Robert Bermel, a world-recognized leading neurologist from Cleveland Clinic, and Dr. Steven Roshon, a specialist in hematology and oncology from Maroon Cancer Center. Last year, Dr. James Stankiewicz, Clinical Director at Partners Multiple Sclerosis Center, joined them.

We hired nine new patient advocates to provide exceptional help to the patients we serve. These patient advocates do our most important work by handling the red tape for patients and holding their hands in



Mark P. McGreevy
President



2016 Milestones

Launched new state-of-the-art technology platform and data management system

Doubled size of office space to accommodate growth

Launched a new brand identity, logo and website

Opened 8 new funds

Hired 9 new patient advocates

the process of getting the financial help they need, so they can focus on their health. We also hired a chief financial officer and leaders in patient outreach, operations and development. We moved into a new, larger office space to make room to grow.

We're continuing to enhance our advanced patient resource management system. We took steps with a new website that can reach more patients and facilitate more applications and engagement. Our connected technology backbone makes it easier to process claims and get funds to patients more quickly. Our reenrollment rates in 2016 were our highest ever.

We also increased our engagement with the advocacy communities our patients are involved in.

We're working with groups like *World Parkinson Congress*, the *National Multiple Sclerosis Society National Leadership* and the *American Society of Clinical Oncology (ASCO)* as mission partners. Our goal is to collaborate with these groups to make their constituencies aware of our assistance and for us to do likewise. There can never be enough awareness of patient resources.

For patients and their families, navigating the finances of their care is becoming more complicated than ever. Your assistance is essential for us to meet these rising needs. The steps we took in 2016 set us up to become a national resource capable of connecting more patients to more financial relief, faster and easier than ever.

On behalf of everyone at our organization and the 23,000 patients your contributions allowed us to serve last year, we thank you.

Sincerely,

Mark McGreevy
President
The Assistance Fund



relief

I have multiple sclerosis.

When I learned about The Assistance Fund, it was definitely a relief – a peace of mind. My encounters with The Assistance Fund have always been so straightforward and simplified, and I just appreciate that. I really do.



hope

I was diagnosed with Parkinson's in 1996.

Whenever there was a new medication, I went online to The Assistance Fund, and we were able to still have a home. Because otherwise we wouldn't have. Nobody has given as much as The Assistance Fund does.



EVERYDAY IMPACT

When we can make a patient's day, it makes our day. By introducing a new fund. Solving a problem at the pharmacy. Delivering good news that a patient qualifies for coverage. Getting them help they didn't think was possible.

Our team of patient advocates helps patients navigate the maze of process that comes with paying for medications. They are the heart of our organization. They're equipped with technology to accelerate the application and claims process. But they're also empowered to take the time necessary to solve complex problems and listen to patients.

One of the most rewarding aspects of our work is the stories patients share with us. For many, we become a source of inspiration by serving as a safety net that they never expected to need. It's remarkable how many of our patients express their gratitude by going online and asking others to give to TAF. They pay it forward.

When we ask patients for feedback on our work, the most common words they associate with TAF are assistance, support and compassion. That's how we know we're making an everyday impact.



Who We Helped in 2016

PATIENTS	
23,000+	Total Patients Helped
10,937	New Enrollments
15,141	Females
7,962	Males

AGES	
904	Under 35
2,931	35-49
8,253	50-64
11,055	65+

TOP 10 STATES	
Florida, Texas, California, Pennsylvania, New York, Ohio, Michigan, North Carolina, Illinois, Georgia	



Your contributions
help patients
gain access to
the medicines
they need.

EXPANDING ACCESS

Often, what stands between a patient and better health is access to the medications they need. Financial realities are the main barrier. Navigating the applications and approvals that come with paying for medication and other related costs adds further stress. That's where The Assistance Fund comes in.

We work efficiently to help qualified patients access their medications as soon as possible, providing a seamless experience. Whenever possible, this includes granting conditional approvals so that a patient at the pharmacy can leave with their medication even as paperwork is still being completed.

In 2016 we expanded the access we're able to provide by launching eight new funds covering eight new patient populations. As one example, a new fund for Duchenne muscular dystrophy provides financial assistance for a broad range of costs associated with this rare disease with limited treatment options. This includes copayments and deductibles as well as medical expenses relating to travel and infusions.

With every fund we open, there is a new group of patients we need to reach. That's why we're increasing our collaboration with mission partners. When we launched our new Duchenne fund, we linked up with *Parent Project Muscular Dystrophy*, the nation's largest organization dedicated to ending Duchenne, to get the word out. Groups like these share our mission and help us reach more patients.



Kevin Munoz, Patient Advocate at
The Assistance Fund

As a Patient Advocate I have the privilege to guide those in need in finding real assistance for their medication expenses. I help them focus on getting better and enjoying their time with their families, without having to worry about whether they can afford their medications.

At The Assistance Fund, I know my work each day makes a positive impact on people's lives. Few jobs have this degree of responsibility, or this feeling of accomplishment.



Covered Diseases

Alpha-1 Antitrypsin Deficiency
Ankylosing Spondylitis
Bladder Cancer
Breast Cancer
Clostridium Difficile Associated Diarrhea
Crohn's Disease
Cystic Fibrosis
Duchenne Muscular Dystrophy
Gaucher Disease
Head and Neck Cancer
Hemophilia
Hepatitis C
Hereditary Angioedema
Hunter Syndrome
Infantile Spasms
Iron Deficiency Anemia
Juvenile Rheumatoid Arthritis
Melanoma
Multiple Sclerosis
Myositis
Nephrotic Syndrome
Neuroendocrine Tumors
Non-Small Cell Lung Cancer
Parathyroid Disease
Parkinson's Disease
Primary Biliary Cholangitis (Cirrhosis)
Primary Immunodeficiency
Psoriasis
Psoriatic Arthritis
Renal Cell Carcinoma
Rheumatoid Arthritis
Sarcoidosis
Short Bowel Syndrome
Skin and Skin Structure Infections
Systemic Lupus Erythematosus
Ulcerative Colitis
Uveitis

Facts & Figures



93% of the donations we received went directly to patient assistance – helping with copays, deductibles, premiums, hospitalizations, travel and other incidentals.



We helped more than 23,000 patients in 2016. About 2/3 of these patients were women. More than 80% were age 50 or older.



123,653 is the number of claims processed in 2016. That's more than 10,000 claims being processed each month.



We helped patients across the country in all 50 states and Puerto Rico. The highest number of claims were received from patients living in Florida, Texas and California.



Our patient advocates answered nearly 120,000 calls in 2016. That's an average of nearly 10,000 calls per month or 500 calls per day.

On the Road

The Assistance Fund team traveled the country to meet with mission partners, connect with patients and spread the word about the opportunity to receive financial assistance and support.

PORTLAND, OREGON

WORLD PARKINSON CONGRESS

September 2016

Joined more than 4,000 patients, facilitators and collaborators at this conference designed to create a worldwide dialogue to discuss the multifaceted problems of Parkinson's disease, propose solutions, build innovative collaborations and create better treatment options.

DENVER, COLORADO

NATIONAL MULTIPLE SCLEROSIS SOCIETY LEADERSHIP

November 2016

The Assistance Fund was both a sponsor and exhibitor at this conference highlighting research updates in multiple sclerosis, advocacy efforts and the National Multiple Sclerosis Society's campaign to improve the lives of those living with MS.

CHICAGO, ILLINOIS

AMERICAN SOCIETY OF CLINICAL ONCOLOGY ANNUAL MEETING

June 2017

Joined more than 30,000 oncology professionals from around the world to discuss treatment modalities, new therapies, and the top issues impacting cancer treatment and survival today.

PARENT PROJECT MUSCULAR DYSTROPHY ANNUAL CONNECT CONFERENCE

June 2017

Connected with families from around the world discussing progress in the fight to end Duchenne muscular dystrophy. Shared information about the financial and emotional support provided by The Assistance Fund.



ORLANDO, FLORIDA

31ST ANNUAL NATIONAL PHILANTHROPY DAY CONFERENCE November 2016

The Assistance Fund sponsored and presented the award for Excellence in Fundraising by a Nonprofit at this conference celebrating the thousands of nonprofit industry workers who dedicate countless hours to improving their communities.

MS DAY OF DISCOVERY December 2016

Joined the National Multiple Sclerosis Society's mid-Florida Chapter at their annual event focused on empowering patients and families living with MS. The Assistance Fund connected with attendees seeking community resources including financial and emotional support.

BALTIMORE, MARYLAND

18TH ANNUAL PATIENT ASSISTANCE & ACCESS PROGRAMS March 2017

The Assistance Fund joined its peers at the largest forum for stakeholders dedicated to prescription drug coverage, financial support and access to care to discuss the legalities, intricacies and best practices for patient assistance programs.

CLEVELAND, OHIO

MELLEN CENTER FOR MULTIPLE SCLEROSIS VISIT August 2016

The Assistance Fund team participated in a tour of the facility, led by neurologist and TAF Medical Advisory Board Member Robert Bermel, MD, to better understand the care and treatment needs of multiple sclerosis patients.



lifesaver

I was diagnosed in 1975 with multiple sclerosis.

All of a sudden the bills started coming in and I said to the doctor, I can't afford this, I don't know what I'm going to do. He suggested The Assistance Fund. It has been a lifesaver. The people who donate...they have no idea how they're touching the lives of just normal people like us.

WAYS TO GIVE FOR EVERYDAY IMPACT

Donors are critical to the assistance we provide to underinsured patients and their families. Every dollar helps. Even patients who have received help from The Assistance Fund often express their gratitude through a donation in an amount that is comfortable to them. There are many ways to donate:

BY PHONE

Call (855) 421-4610 and talk to someone from our Fund Development department.

ONLINE

Complete the donation form on our website.

BY MAIL

Print out the giving form available on our website.

PLANNED GIVING

Remember TAF in your will or trust.

EMPLOYER MATCHING

Double your impact. Many employers will match tax-deductible charitable contributions.

AMAZON SMILE

Dedicate a portion of your spending on Amazon.com to TAF by visiting smile.amazon.com and selecting "Assistance Fund Inc" as your charity.

GOODSEARCH

Select "Assistance Fund" as your cause and for every search on GoodSearch, one penny or a percentage of your purchase is donated to TAF.

INDUSTRY DONORS

Donate to a new or existing fund to help patients access the medicines they need.



Our New Brand

You may have noticed that The Assistance Fund has a fresh look. Our new logo signifies our commitment to the patients we serve. Comprised of "cause" ribbons arranged in a style reminiscent of the medical Star of Life, the logo symbolizes our efforts to serve individuals diagnosed with various diseases. The six ribbons also signify our six core tenets: Advocacy, Compassion, Support, Communication, Integrity and Optimism.

STATEMENTS OF FINANCIAL POSITION

June 30, 2016 2015

ASSETS

Current assets:

Cash and cash equivalents	\$ 58,018,223	\$ 43,565,271
Investments	17,993,505	18,025,671
Contributions receivable	5,221,994	8,707,996
Prepaid expenses and other current assets	48,207	32,203
Property and equipment, net	889,595	302,806

Total Assets	\$ 82,171,524	\$ 70,633,947
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LIABILITIES AND NET ASSETS

Liabilities:

Accounts payable and accrued expenses	\$ 341,399	\$ 274,459
Claims payable	3,584,421	1,101,482
Deferred revenue	45,000	21,307
Deferred rent liability	237,343	—

Total Liabilities	\$ 4,208,163	\$ 1,397,248
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COMMITMENTS AND CONTINGENCIES

Net assets:

Unrestricted	\$ 11,616,613	\$ 9,541,188
Temporarily restricted	66,346,748	59,695,511

Total net assets	77,963,361	69,236,699
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Total Liabilities and Net Assets	\$ 82,171,524	\$ 70,633,947
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MEDICAL ADVISORY BOARD

The members of the Medical Advisory Board offer strategic advice and counsel to the Board of Directors, review TAF programs and recommend funding for research grant awards.

Robert Bermel, M.D.
Cleveland Clinic
Neurological Institute's
Mellen Center for Multiple
Sclerosis

**Steven G. Roshon,
M.D., FACP**
Cleveland Clinic Florida
Cancer Center

James M. Stankiewicz, M.D.
Harvard Medical School,
Brigham and Women's
Hospital, Partners Multiple
Sclerosis Center

BOARD OF DIRECTORS

The board is responsible for all decisions related to program criteria and financial awards. Board members guide and assist TAF's leadership team while ensuring accountability to donors and patients.

Vincent E. Schreiber, CFA,
Chair
Schreiber Development

Lawrence Hatch,
Vice Chair
SunTrust Bank

Jeff Milford, CPA,
Treasurer
Courtney Leasing

John W. Gravitte, Jr.,
Secretary
AgileThought

Justin Aronson, JD,
Board Member
Greenberg Traurig

John Fraley,
Board Member
Orthomedx Corporation

John Hawley, D.O.,
Board Member
Naval Hospital Jacksonville

Julie Judge,
Board Member
Maxim Healthcare Services



**The
Assistance
Fund**

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The Assistance Fund is an independent charitable patient assistance foundation that helps patients and families facing high medical out-of-pocket costs by providing financial assistance for their copayments, coinsurance, deductibles and other health-related expenses. Since its founding in 2009, The Assistance Fund has helped more than 43,000 adults and children access the medicines they need to stay healthy or manage a chronic condition.

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