



MASSACHUSETTS
Soldiers Legacy Fund

2023 ANNUAL REPORT

HONOR THE SACRIFICE OF MASSACHUSETTS FALLEN HEROES

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Dear MSLF Supporters:

As the Massachusetts Soldiers Legacy Fund (MSLF) enters its 20th year of operation, our organization continues its mission of honoring the sacrifice of local fallen Servicemembers and their families. Throughout the calendar year 2023, the MSLF distributed over \$361,000 in education-focused grants to our eligible beneficiaries and has issued nearly \$3.6 million since our inception.

With support from the MSLF, the children of Massachusetts' fallen heroes continue to thrive and achieve their education-related goals. At the conclusion of the 2023 calendar year, 89 children were eligible for MSLF grants. This past year, of our eligible beneficiaries, 21 young adults were enrolled in college and received MSLF grant assistance. In addition to supporting our eligible students in college, the MSLF provided education-focused support grants to 20 additional children throughout 2023. We accomplished much this past year, but we still have many miles to go in our mission. As we enter 2023, 60% of our eligible beneficiaries are between the ages of 14 and 24, and 12 of our eligible children are under the age of 13, with the youngest child being 7 years of age.

Our MSLF organization is committed to building on the achievements and impact we had throughout the 2023 calendar year. With your help, we will continue to honor our local fallen heroes' sacrifice by supporting their surviving children's educational pursuits. Thank you for your steadfast support and—most importantly—for assuring the sacrifice of MSLF-eligible families will always be remembered.

Best Regards,

A handwritten signature in black ink that reads "Pete". The signature is written in a cursive, flowing style.

Peter Trovato
MSLF Founder and Trustee

GRASSROOTS FUNDRAISING + COMMUNITY EVENTS

Our supporters and donors are the foundation in which we can provide these grants. We are appreciative to all who have helped the children of the families of the fallen.

THE LOEBER FAMILY FOUNDATION

The MSLF is extremely grateful to the Loeber Family Foundation for a donation of \$15,000. Since 2020, the foundation has donated \$65,000 to local families of the fallen in support of their education goals.

RED SOX GAME

On a beautiful day in August our families enjoyed a day at Fenway Park! These outings are well received, and families are able to gather together and have a fun time.

CENTINEL FINANCIAL

Centinel Financial raised \$5,000 in their annual golf day for the fund. Since 2016, they have raised over \$25,000.



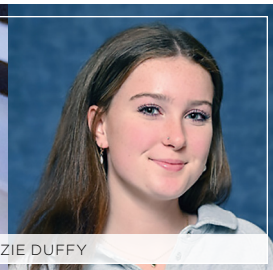
NATHAN OLIVEIRA



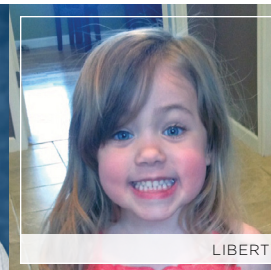
MACKENZIE DUFFY



LIBERTY STEELE



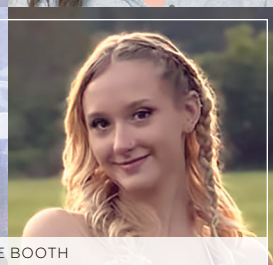
COLIN + AVERY VAN DE GIESEN



GRACE BOOTH



SKYLAH SHERMAN



FAMILY UPDATE: 20 YEARS

1LT PAUL BROWN

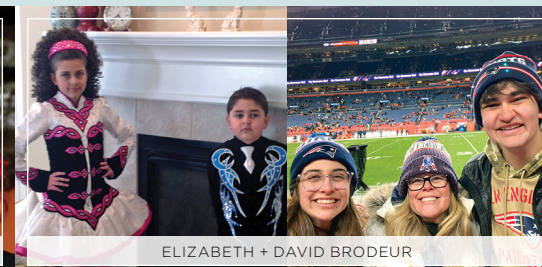
The Massachusetts Soldiers Legacy Fund takes a comprehensive approach to working with families, education and keeping up with our students as they finish school and begin their adult lives. Paul Brown is the son of CIA Agent Hal Brown. Sadly, Agent Brown lost his life in Afghanistan in 2010. He left behind his wife, their son Paul and daughters Lana and Claire as well as a loving extended family. Lana is currently a teacher after graduating from Boston University. Claire is a junior in high school and a brilliant ballet dancer. He also left his parents and two sisters in Bolton, MA. Paul is currently the commander of the 5C1 Medina Recruiting Company in Ohio. He oversees five recruiting stations, a major accomplishment for a young lieutenant. Paul and his wife, Gia, have two boys, Blaise, and Patrick. On completion of his command, they will continue to Fort Huachuca, AZ and soon will be promoted to Captain! The MSLF is so proud of Paul and humbled to take part in his education. It is a pleasure to know Paul and his family!

"The MSLF was instrumental in ensuring I could focus on my studies at the Virginia Military Institute and work towards commissioning into the United States Army. Without it I never could have been as successful and mentally at peace as I was. They will always be like a second family to me, and I am eternally grateful."

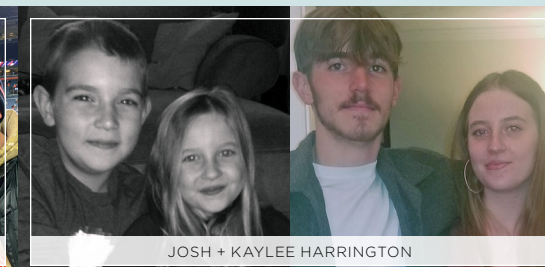
- 1LT Paul Brown



KYLEE LITTLE



ELIZABETH + DAVID BRODEUR



JOSH + KAYLEE HARRINGTON

FINANCIAL INFORMATION

2023 FINANCIAL SUMMARY

Year End Assets Value	\$	3,161,262.42
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Year End Donation Income	\$	30,321.58
<hr/>		
Investment Income (Dividends)	\$	56,993.04
<hr/>		
Investment Income (Unrealized Gain, Loss)	\$	448,389.53
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Operating Expenses as % of Asset Base		5.56%

2023 SUMMARY BALANCE SHEET

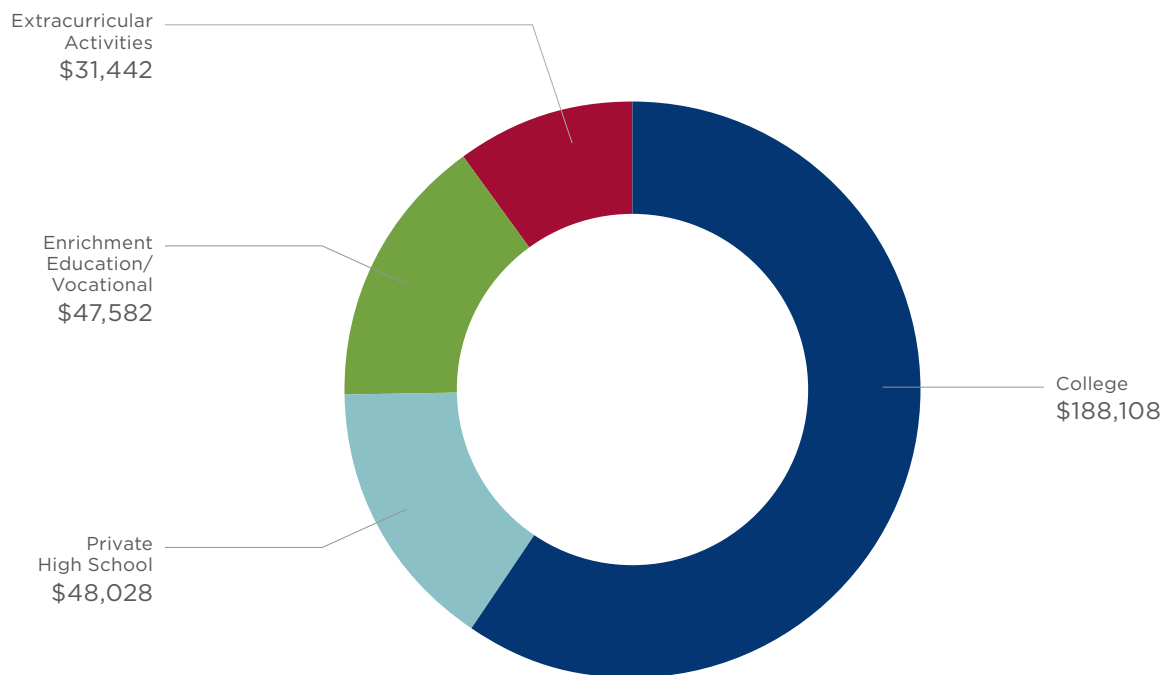
ASSETS		
MSLF Trust Account Balances	\$	3,099,778
Operating Account	\$	60,249
Prepays	\$	1,235
Total Assets	\$	3,161,262
LIABILITIES		
Grant Commitments	\$	188,441
Total Liabilities	\$	201,435
TOTAL LIABILITIES AND NET ASSETS		
Total Liabilities & Net Assets	\$	3,161,262

2023 FUND FACTS + YEAR SUMMARY

FAMILY UPDATE

SERVICEMEMBERS	54
<hr/>	
CHILDREN ELIGIBLE	89
<hr/>	
CHILDREN AWARDED GRANTS	41
<hr/>	
2023 GRANTS DISTRIBUTED	\$361,333

2023 FUND DISTRIBUTION SUMMARY



STATISTICS BY SERVICE BRANCH



ARMY
38



AIR FORCE
1



MARINES
11



NAVY
3



CIA
1

COMMUNITY SUPPORT

SUPPORTING ORGANIZATIONS

The MSLF is honored to be a part of a group of supportive organizations that support Gold Star/Surviving Families. We thank you for your support!

American Gold Star Mothers Inc.

www.goldstarmoms.com

American Gold Star Wives

www.goldstarwives.org

Army Survivor Outreach Services

www.armymwr.com

The Jeffrey Coombs Memorial Foundation

www.jeffcoombsfund.org

Massachusetts Department of Veterans' Services

www.mass.gov/veterans

Massachusetts Fallen Heroes

www.massfallenheroes.org

Massachusetts Military Heroes Fund

www.massmilitaryheroes.org

Military Friends

www.militaryfriends.org

Project New Hope

www.projectnewhopema.org

Home Base Veteran and Family Care

www.homebase.org

Thanks to Yanks

www.thankstoyanks.org

Veteran Centers

www.vetcenter.va.gov

Wreaths Across America

www.wreathsasscrossamerica.org

Nathan Oliveira
Father: CPL Brian Oliveira
College of the Canyon

"Thank you MSLF for your continued support. With your support my son was able to fill his middle school and high school years with memorable memories of camp activities. He was able to purchase a laptop to pull through the isolated homeschooling days from the stay-at-home order due to Covid. Still, with your continued support you have freed us from the worry of the cost of textbooks and course fees. I do not utilize our military benefits enough because of the overwhelming information and steps required to access it, but with MSLF, especially with the guidance of Erica, asking for help was seamless (which is a personal struggle of mine). A million thanks to the foundation!"

Mackenzie Duffy
Father: SSG Shane Duffy
Sophomore in High School

"Mackenzie is in 10th grade at Tri County Regional Vocational Tech where her career pathway is Legal & Protective Services. She enjoys school and sports, and spending time with friends and family makes her most happy. Her favorite subject is history, and she is challenging herself by taking AP US History this year. The MSLF has time and again helped carry the financial burden of camps and activities she may not otherwise be able to do. This has enriched her life and my life in ways we can never fully express. It has helped her reach goals and push further in setting new ones. It has allowed us to fully explore opportunities and look to the future knowing we have help throughout that process. We are so appreciative."

BOARD OF TRUSTEES

Peter Trovato

MSLF Founder & Managing Director, Copley Equity, Boston, MA

Robert Hale

CEO, Granite Telecommunications, Quincy, MA

Glenn Mangurian

CEO, Frontier Works, Hingham, MA

Timothy Pinch

Principal, GW & Wade, Wellesley, MA

Eric Kapitulik

CEO, The Program, Woburn, MA

Tom Jennings

Managing Director, Summit Partners, Boston, MA

Ryan Durkin

VP Growth, WHOOP, Boston, MA

Erica Zeiger

Director, MSLF, Marlborough, MA

Kylee Little

Father: SPC Kyle A. Little
Sophomore in High School

“Kylee loves to travel and has been to Canada, Ireland, and England as well as many US states. She is taking advanced and dual enrollment classes. She takes three dance classes, voice, guitar, Girl Scouts (has earned her silver award and working on her Gold), and she is part of Key Club and Students Against Drunk Driving. She is part of the journalism staff at school with aspirations of becoming a journalist. She is heavily involved in theater, acting, and writing scripts for competitions and is also an International Thespian Officer. Having diverse interests and being able to be so involved in her community is what makes Kylee happy. Without MSLF she wouldn't be able to do all these things and be so involved in her school and community.”

Skylah Sherman

Father: SGT Benjamin W. Sherman
8th Grade

“I am in the 8th grade and 13 years old. MSLF has guided and helped me throughout the years, from helping me during Covid with getting a computer and printer to helping me keep busy with my high demand sports such as basketball and softball. A holiday tradition we do is always celebrating Benjamin's birthday. They have always made me smile during the holidays and make sure they always talk to me when I am at events. I am grateful for MSLF for always being there.”

HOMETOWN HEROES



Sergeant
Glenn Allison



Specialist
David Babineau



Sergeant
Robert Barrett



Staff Sergeant
Alicia Birchett



First Lieutenant
Joshua Booth



Corporal
Jeremy Bouffard



Major
David Brodeur



Harold Brown
CIA



Captain
Joel Cahill



Sergeant
William Callahan



Staff Sergeant
Joseph Camara



Staff Sergeant
Paul Cunningham



Specialist
Jonathan Curtis



Private First Class
Norman Darling



Master Sergeant
Luis DeLeon



Sergeant
Shane Duffy



Sergeant First Class
Eric Emond



Sergeant
Peter Enos



Navy SEAL
Michael Ernst



Corporal
Paul Fagundes



Sergeant
Andrew Farrar



Gunnery Sergeant
Elia Fontecchio



Sergeant
Alexander Fuller



Sergeant
Kyle Harrington



Navy SEAL
Kevin Houston



Specialist Theodore
"TJ" Ingemanson



Chief Warrant Officer 3
Kyran Kennedy



Petty First Class
Jason Lewis



Sergeant
Kyle Little



Captain
John Maloney



Staff Sergeant
Michael Mantenuto



Major
Brian Mescall



Sergeant
Scott Metcalf



Captain
Seth Michaud



Sergeant
Alberto Montrond



Staff Sergeant
Daniel Newsome



Corporal
Brian Oliveira



Sergeant
Ryan O'Malley



Captain
Anthony Palermo



Sergeant
Theodore Perreault



Staff Sergeant
Christopher Piper



Sergeant
Nelson Rodriguez Ramirez



Major
John Ruocco



Lance Corporal
Nicholas Schiavoni



Sergeant
Benjamin Sherman



Master Sergeant
Shawn Simmons



First Lieutenant
Timothy Steele



Captain
Christopher Sullivan



Master Sergeant
Gregory Trent



Captain
Kyle Van De Giesen



Lance Corporal
John VanGyzen



Chief Warrant Officer 2
Stephan Wells



Sergeant
Gregory Wright



Specialist
Edgardo Zayas

MSLF MISSION

The Massachusetts Soldiers Legacy Fund is a charitable trust that seeks to honor Massachusetts Fallen Servicemen and Servicewomen, who died while supporting military operations post 9/11, by providing educational assistance grants to their children.

Children qualify if their parent in the military died supporting the global war on terrorism and whose death was credited to the Commonwealth of Massachusetts. There is no selection process. If the child is a son or daughter of a Serviceman or Woman whose service is credited to Massachusetts and gave his/her life in support of the Global War on Terror, that child then qualifies for funds. To date, over 175 Servicemembers from Massachusetts have died. Of these casualties, 54 were parents who left behind a total of 89 children, ranging in age from five years old to 35 years of age. All of these children are now eligible to receive funding through the MSLF program.

All contributions to the MSLF are collected and pooled together in an investment account that is managed on a pro-bono basis by GW & Wade Asset Management in Wellesley, MA. In an effort to preserve donor contributions, the MSLF Board of Trustees has adopted an investment strategy with low market risk.



MASSACHUSETTS 
Soldiers Legacy Fund

You can visit www.mslfund.org or call
(508) 630-2382 to learn more about the MSLF.

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