



American Optometric Foundation

2001-2002  
Annual Report



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The American Optometric Foundation is a philanthropic organization which develops and provides financial support for optometric research and education in vision and eye health.

*an affiliate of the American Academy of Optometry*

### **2001 – 2002 Board of Directors**

|   |                         |
|---|-------------------------|
| George W. Mertz, OD, FAAO               | President               |
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| Jacques Stoerr                          |                         |
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| Christine L. Armstrong                  | Foundation Director     |



George W. Mertz, 2001 – 2002 President

### **AOF Past Presidents**

|                                   |             |
|-----------------------------------|-------------|
| William C. Ezell, OD              | 1947 – 1961 |
| Herbert L. Kent, OD               | 1961 – 1963 |
| Emmons L. Eichorn, OD             | 1963 – 1968 |
| Bernard C. Jander, OD             | 1968 – 1970 |
| O. Doyle Dannenberg, OD, FAAO     | 1970 – 1972 |
| Spurgeon B. Eure, OD, FAAO        | 1972 – 1974 |
| Thomas F. Brungardt, OD, FAAO     | 1974 – 1976 |
| Ned P. Hobbs, OD, FAAO            | 1976 – 1977 |
| Harold E. Davis, OD FAAO          | 1977 – 1979 |
| John R. Kennedy, OD, FAAO         | 1979 – 1981 |
| Carl W. Childress, OD, FAAO       | 1981 – 1984 |
| Sanford E. Kaps, OD, FAAO         | 1984 – 1986 |
| Emile J. Bernard, Jr., OD, FAAO   | 1986 – 1988 |
| V. Eugene McCrary, OD, FAAO       | 1988 – 1989 |
| Bob L. Baldwin, OD, FAAO          | 1989 – 1990 |
| Stanley J. Yamane, OD, FAAO       | 1990 – 1991 |
| Robert M. Wold, OD, FAAO          | 1991 – 1992 |
| Dale L. Lervick, OD, FAAO         | 1993 – 1994 |
| Bert C. Corwin, OD, FAAO          | 1995 – 1996 |
| P. Sarita Soni, OD, MS, FAAO      | 1997 – 1998 |
| Earl L. Smith, III, OD, PhD, FAAO | 1999 – 2001 |

## W e l c o m e

Over the past year, the American Optometric Foundation (AOF) experienced many achievements and faced many challenges. The recent loss of our President, Dr. George Mertz, has had a profound effect on AOF. In remembering George, we have had the opportunity to reflect on our mission, initiatives, and goals.

George was not only an enthusiastic advocate for AOF, but for the optometric profession as a whole. He worked hard to ensure that young people who entered the profession were supported in their development—both through mentoring and through financial support. He championed the need to train future educator/researchers for our schools and colleges of optometry.



Last year, at AOF's Annual Research Luncheon in Philadelphia, George said, "I have discovered that the position (AOF President) is more challenging and satisfying than I could have predicted." By "challenging" he meant it was quite difficult to raise the funding that optometry needs to move forward to new levels, and by "satisfying" George meant he enjoyed watching young optometrists who were supported by

AOF's Ezell Fellowship program. He was willing to meet the challenges because he found fulfillment in the success of the many students and researchers supported through AOF. AOF is thankful for the donations it has received in George's memory. He was so very fortunate to have experienced the friendship and the respect of those around him. We will keep George in our hearts as AOF looks to the future.

In planning for AOF's future, our Board of Directors has taken on the task of re-evaluating AOF's business plan and investment strategies. As with most businesses, as well as individuals, the current financial climate made this a challenging year for AOF. Our endowment, which relies on investment income for growth and provides the funding for AOF's administrative needs, suffered a loss. Our donors have also been personally affected, resulting in a decline in annual contributions.

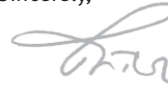
Despite these challenges, AOF administered over \$243,000 in financial assistance through numerous programs that further our mission of supporting education and research. The most prestigious of these is the William C. Ezell Fellowship Program, which supports post-graduate students who plan to pursue an academic career in optometry and vision science. AOF is grateful to the following corporations for sponsoring the 2002–2003 Ezell Fellowships: Bausch & Lomb, CIBA Vision,

Essilor, Ocular Sciences, Inc., and Vistakon (2 Fellowships). One of the greatest contributions that AOF receives is the personal commitment of these industry leaders.

Of course, none of AOF's accomplishments would be possible without the financial support we receive from our donors. I want to thank all who have contributed, but I also need to ask you to contribute again, and to contribute more. As George stated upon his appointment at President of AOF in 2000, "The training of qualified educator/researchers is critical to the bright future we all want for optometry.

Those who choose academic careers in optometry have less than half a lifetime earning power of those who enter most of the various modes of optometric practice. The few who sacrifice personal gain for the good of the profession in this way are deserving of our gratitude and support. While the AOF has a distinguished record of support for post-graduate optometric education through Ezell Fellowships and other programs, there is still a need to do much more."

Sincerely,

A handwritten signature in black ink, appearing to read "Peter Bergenske". The signature is fluid and cursive, with a large initial "P" and a long, sweeping underline.

Peter Bergenske, OD, FAAO  
President

## Ezell Fellowships

Inspired by the need to advance optometric research and education, Dr. William C. Ezell founded the American Optometric Foundation (AOF) in 1947. As a means to fulfill his vision, AOF established the William C. Ezell Fellowship. To this day, the Ezell Fellowship program continues to provide financial support to postgraduate students who plan to pursue an academic career in optometry and vision science.

Over the past half-century, AOF and the Ezell Fellowship program have helped make optometric education what it is today. The list of former Ezells includes, deans, presidents, and prominent faculty members at the schools and colleges of optometry. AOF salutes the Ezell Fellows, past and present, for their continuing contributions to vision science and to the profession of optometry.

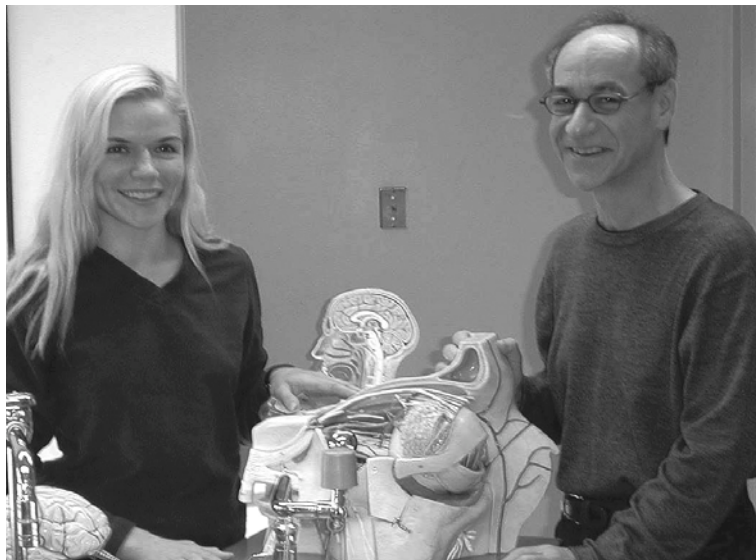
### *Ezell Fellows 1949 – 2002*

|                           |                            |                             |                        |
|---------------------------|----------------------------|-----------------------------|------------------------|
| <b>Anthony Adams</b>      | <b>William R. Baldwin</b>  | T. Rowan Candy              | Mark H. Criswell       |
| Deborah                   | Thomas A. Banton           | <b>Darrell B. Carter</b>    | Kent M. Daum           |
| Adler-Grinberg            | <b>Felix M. Barker, II</b> | Thomas Cedarstaff           | Brian E. Davis         |
| <b>Arthur J. Afanador</b> | William S. Baron           | Freddy W. Chang             | Wendy Davis*           |
| Philip Aitsebaomo         | William Benjamin           | <b>Walter W. Chase</b>      | Peter Davison          |
| Kevin L. Alexander        | Michael J. Bennett         | Dimitri A. Chernyak         | Anthony F. DiStefano   |
| <b>Dale Allen</b>         | William J. Bennett         | <b>Susana Chung</b>         | Robert H. Duckman      |
| John F. Amos              | Roger L. Boltz             | <b>Kenneth J. Ciuffreda</b> | Michael J. Earley      |
| Roger S. Anderson         | <b>Joseph Bonanno</b>      | Joel Citron                 | Jess Boyd Eskridge     |
| Raymond Applegate         | <b>Ernest L. Bowling</b>   | <b>Bradley Coffey</b>       | David Evans            |
| <b>Brian S. Armitage</b>  | <b>Norma K. Bowyer</b>     | Nancy J. Coletta            | <b>Barbara A. Fink</b> |
| James E. Bailey           | Arthur Bradley             | <b>Jeffrey Cooper</b>       | Frederick Finkler      |
| Melissa D. Bailey*        | Kenneth E. Brookman        | David Corliss               | Barry M. Fisch         |
| <b>Neal J. Bailey</b>     | William L. Brown           | Lawrence K. Cormack         | <b>Merton C. Flom</b>  |



Dr. Gerald Lowther (left), Dean of Indiana University School of Optometry, with Dr. Pete Kollbaum, 2002 Ezell Fellow.

*Names in bold indicate Ezell Club members.  
\* current Ezell Fellow*



Ms. Wendy Davis, 2002 Ezell Fellow, with Dr. Dennis Levi, Dean of the University of California–Berkeley School of Optometry.

**Brad Fortune**  
**Thomas F. Freddo**  
 Donald Freeman  
 Ralph Freeman  
**Daniel Freson**

Claude J. Giasson  
**Michael J. Giese**  
 Herbert L. Glatt  
**Gregory W. Good**  
 David A. Goss

Ben M. Graham  
 Ronald S. Grand  
 David A. Greenberg  
 Eric Greene  
**Steven B. Greenspan**

Leslie D. Handmacher  
 Michel Hanen-Smith  
 William A. Hare  
 Andrew T. E. Hartwick\*  
 Daniel Harvitt  
 Ronald S. Harwerth  
**Gordon G. Heath**  
 Michael H. Heiberger  
 Philip H. Hendrickson  
 David B. Henson  
 Debbie L. Hettler  
 Jennifer L. Hicks  
 Nikole Himebaugh  
 Peter Hitchcock  
 Patrick J. Hutson  
 Cheryl A. Jackson  
 Kent C. Jensen  
**Murray H. Johnson**  
 Edward R. Johnston  
 Jule Jose  
 Janice M. Jurkus  
 Melvyn E. Kalich

Steven Kastenbaum  
 Kevin Katz  
 Chea-su Kee  
 Emily Kenyon  
**Vincent M. King**  
**David G. Kirschen**  
**Robert N. Kleinstein**  
 Joanne Klopfer Carr  
 Dale M. Koers  
 Pete S. Kollbaum\*  
 Karla M. Kraeszig  
 Kathleen Krenzer  
**Timothy W. Kraft**  
 Stuart L. Krieger  
 Philip Krueger  
 Patrick Ladage  
 Vasudevan  
 Lakshminarayanan  
**Ben C. Lane**  
 Ellen Lee  
 John M. Lee  
 David Y. Lee

John Leven  
 Dennis M. Levi  
 Alan L. Lewis  
 Gary L. Liberman  
 William F. Long  
**Gerald E. Lowther**  
 Per Lundmark  
 Gregory W. Maguire  
 Luke Mahon  
**Robert B. Mandell**  
 Ruth E. Manny  
 David Marshall, Jr.  
 Martin A. Mass  
 John Massare  
**Robert Massof**  
**Steven M. Mathews**  
 Glen L. McCormack  
 Marlin T. McKamey  
 Thomas McWilliams  
 Lawrence Miller  
 Stanley D. Miller  
 John Moxley



Karla Mulcahy  
Venki Narayan  
Catherine Neary  
**Bernard Nevel**  
Jason Nichols\*  
**Kelly K. Nichols**  
Vigo Nielsen  
**Harris Nussenblatt**  
Editha Ong  
Gary N. Orsborn  
Anastas F. Pass  
**Jerry R. Paugh**  
Paul L. Pease  
Louis J. Phillips  
**Todd R. Pickens**  
**Gilbert E. Pierce**  
Stuart M. Podell  
**Kenneth A. Polse**  
Gary L. Porter  
Eugene J. Potvoricky  
Paul R. Poynter  
**Thomas G. Quinn, Jr.**

**Thomas W. Raasch**  
**Marjorie J. Rah**  
Carol Dibble Record  
David M. Regan  
Arnulf Remole  
Rosa I. Revuelta  
**Stuart Richer**  
**Larry W. Ritter**  
William R. Roscoe  
**Alfred A.**  
**Rosenbloom, Jr.**  
Robert P. Rutstein  
**Thomas O. Salmon**  
Dennis L. Sawyer  
Paulette P. Schmidt  
**John P. Schoessler**  
Clifton M. Schor  
David Schultz  
**Steven H. Schwartz**  
Julie Scott  
Karin M. Seidel  
Ronald E. Serfoss

Jerome Sherman  
David A. Simmons  
**Earl L. Smith, III**  
**Chris Snyder**  
William Somers  
Mark A. Sommer  
Perry Speros  
Scott A. Steel  
Gregory L. Stephens  
**Charles R. Stewart**  
Jerald W. Strickland  
Wayne N. Tabachnick  
Ellen S. Takahashi  
Theanchai Tanlamai  
**Larry N. Thibos**  
Tonya Thomas  
Thomas D. Thorn  
**Joseph Trachtman**  
Gary L. Trick  
Ashley Kuang-Mon Tuan  
Michael Twa\*  
**Daniel Twelker**

C. Allen Uniacke  
Mark Uslan  
Richard Van Sluyters  
**Suresh Viswanathan**  
**Jeffrey J. Walline**  
**Norman E. Wallis**  
Richard C. Weber

**Barry A. Weissman**  
Michael D. Wesson  
Bradford W. Wild  
Thomas M. Wiley  
**Graeme Wilson**  
**Michael J. Woloschak**  
James A. Worthey

**Yen LeeYap**  
Milton A. York, Jr.  
Joseph R. Zahn  
**Frank Zisman**



Dr. John Schoessler, Dean of The Ohio State University College of Optometry, with the 2002 Ezell Fellows (left to right); Drs. Melissa Bailey, Michael Twa, and Jason Nichols.

*Bausch & Lomb – Ezell Fellow*



**Andrew T. E. Hartwick,  
O.D., M.Sc**  
Dalhousie University  
Department of Anatomy &  
Neurobiology

**Research Focus:** The retinal ganglion cell death that

occurs and the potential for neuroprotective therapies for glaucoma.

*It is truly a privilege to have been chosen as an Ezell fellow, and I am extremely grateful for this honor. This award promotes the training of future optometric researchers and educators, and I would like to express my sincere appreciation to all AOF supporters.*

*Ciba Vision – Ezell Fellow*

**Melissa Diane Bailey, O.D., M.S.**  
The Ohio State University  
College of Optometry



**Research Focus:**  
Investigating visual  
function after LASIK.

*The American Optometric  
Foundation has a long  
history of support for the*

*optometric profession and the future of optometric research. Receiving an Ezell Fellowship is important to me for support while I complete my research training, and it has also encouraged me to pursue a career in research and academia. I am honored to be included among those who have been recipients of this award.*

*Essilor – Ezell Fellow*

**Pete S. Kollbaum, O.D.**  
Indiana University  
School of Optometry



**Research Focus:** The  
measurement and correc-  
tion of optical aberrations  
in dynamically changing  
normal and diseased eyes.

*The William C. Ezell Fellowship supported by the American Optometric Foundation and companies, like Essilor, is a great opportunity and honor for a young optometric educator and vision researcher like myself. The Fellowship not only provides great motivational support, but also provides tremendous financial support for me while working on furthering my education. It allows me the capabilities to focus on my research. For this support and for the support of all my peers and mentors, I am very thankful.*

*Ocular Sciences – Ezell Fellow*



**Michael D. Twa, O.D.**

The Ohio State University  
College of Optometry

**Research Focus:** Clinical  
and applied research  
of corneal structure and  
optical function.

*Support of the American Optometric Foundation is important to my long-term career objectives, which are to conduct independent research in vision science and to become a leader in optometric education. Selection as an Ezell fellow by the American Optometric Foundation is a unique and prestigious honor. I am proud to receive support and recognition from an organization that has made education and excellence in optometric research a high priority.*

*Vistakon – Ezell Fellows*

**Wendy Davis, M.S.**

University of California – Berkeley  
School of Optometry



**Research Focus:** Measuring  
the role of chromatic  
saturation and luminance  
contrast in color spreading  
using hue cancellation.

*Financial support from the Ezell Fellowship allows me to focus more time and attention on my teaching and research. The funding relieves time and money constraints that graduate students struggle with and enables me to be far more productive than I would otherwise. Further, this award serves as validation of my previous work and confidence in my potential in the field of vision science by the AOF. This recognition acts as encouragement and motivation for continued achievement.*

**Jason J. Nichols, O.D., M.S.**

The Ohio State University  
College of Optometry

**Research Focus:** The  
distribution of and risk  
factors for contact lens-  
related dry eye.



*Receiving the Vistakon Ezell Fellowship has been one of the highest honors I have been awarded in my professional career and I am proud to be among the ranks of those preceding me in this elite group. It is an honor to receive such an award, which would not be possible without the generosity of Vistakon. It fills me with pride to follow in this select group of individuals who have made such outstanding contributions to our profession.*

## Research & Educational Support

*We are proud to recognize the outstanding students and researchers who received financial support through the American Optometric Foundation's scholarship, grant, and award programs. We also extend our appreciation to our corporate sponsors whose generosity made this funding possible.*

### **2002 Vistakon Awards of Excellence in Contact Lens Patient Care**

To recognize outstanding student clinicians who have demonstrated excellence in contact lens patient care during their optometric education.

|                                    |   |  |   |
|------------------------------------|---|--|---|
| <b>Monika Spokaite, O.D.</b>       | Illinois College of Optometry                               | <b>Giela Nussbaum Gellis, O.D.</b>           | State University of New York<br>College of Optometry            |
| <b>Carla Blankenship, O.D.</b>     | Indiana University School of Optometry                      | <b>Jordi Michelle Sawyer, O.D.</b>           | University of Alabama – Birmingham<br>School of Optometry       |
| <b>Kirby Lam, O.D.</b>             | Michigan College of Optometry at<br>Ferris State University | <b>Joy Utterberg, O.D.</b>                   | University of California – Berkeley<br>School of Optometry      |
| <b>Amy C. Croteau, O.D.</b>        | New England College of Optometry                            | <b>Daphne L. Richardson, O.D.</b>            | University of Houston<br>College of Optometry                   |
| <b>Selina R. McGee, O.D.</b>       | Northeastern State University<br>College of Optometry       | <b>Brandon Karl Hunter, O.D.</b>             | University of Missouri – St. Louis<br>School of Optometry       |
| <b>Thuy-Lan Nguyen, O.D.</b>       | NOVA Southeastern University<br>College of Optometry        | <b>Kaye-Anne Haykal, O.D.</b>                | Universite de Montréal École<br>d'optométrie                    |
| <b>Angela Zurowski, O.D.</b>       | The Ohio State University<br>College of Optometry           | <b>Mira Park, O.D.</b>                       | University of Waterloo<br>School of Optometry                   |
| <b>Lorayne Middendorp, O.D.</b>    | Pacific University College of Optometry                     | <b>Vanessa M. Cabrera<br/>Fossatti, O.D.</b> | Inter American University of Puerto Rico<br>School of Optometry |
| <b>Mira Silbert Aumiller, O.D.</b> | Pennsylvania College of Optometry                           |  |   |
| <b>Shin J. Kim, O.D.</b>           | Southern California<br>College of Optometry                 |  |   |
| <b>Julie Fender Hogan, O.D.</b>    | Southern College of Optometry                               |  |   |

***2002 Vistakon Student Involvement Award***

Awarded to a deserving second or third year optometry student by the faculty of the Southern California College of Optometry for demonstrating a high degree of participation in professional and community service activities while maintaining a 3.0 or higher cumulative grade point average.

**Kevin M. Huff** Southern California College of Optometry

***2002 Biocompatibles Eyecare Innovative Research Awards***

This award is intended to expand or explore the current body of knowledge in the field of contact lens and associated technology. Each student must submit a 2,500 word research paper on this subject.

**Nancy Truong** Illinois College of Optometry  
**Sasha Godenir & Mark Labhart** Indiana University College of Optometry  
**Jason Tuchowski & Christopher D. Zehnder** Michigan College of Optometry at Ferris State University  
**Bonita P.H. Wong** New England College of Optometry  
**Keith Miller** Northeastern State University College of Optometry  
**Tara Brousseau** NOVA Southeastern University College of Optometry  
**Jacob Thomas Janecek, Kenny B. Lee, Mitchell J. Maier** Pacific University College of Optometry  
**Kirsten Ann Jervis** Pennsylvania College of Optometry

**Bahareh Golbahar & Elham Zarabian** Southern California College of Optometry  
**Daniella Rutner** State University of New York College of Optometry  
**Stephanie Bojo Bedsole** University of Alabama–Birmingham School of Optometry  
**Stacey Aboutealebi, Tiffany Corby, Joy Utterberg** University of California–Berkeley School of Optometry  
**Joy Martin\*** University of Houston College of Optometry  
**Michael A. Santarlas** University of Missouri–St. Louis School of Optometry  
**Barbara Pittaras** Inter American University School of Optometry

*\* Awarded the overall grand prize for her paper entitled New Applications in Wave-front Sensing: Predicting Visual Performance with Multizone Bifocal Contact Lenses*

***2002 Antoinette Molinari Memorial Scholarship***

A rotating scholarship designed to assist an exceptional student who has extraordinary financial needs and, as such, would have difficulty meeting the financial requirements of attending optometry school.

**Jennifer S. Roehn**                      The Ohio State University College of Optometry

***2002 Vincent Salierno Scholarship***

A rotating scholarship that is awarded to a student chosen by the faculty as most deserving, both financially and as reflected in their studies. The scholarship is renewed through the student's fourth year of optometry school, provided that the student remains in good standing and maintains a 3.0 grade point average or higher.

**Ms. Tanya Hedman**                      Michigan College of Optometry at Ferris State University

**Mr. Kenneth Sawyer**                      NOVA Southeastern University College of Optometry

**Mr. Robert Steinmetz**                      Illinois College of Optometry

**Ms. Anna Tseler**                      Pennsylvania College of Optometry

***2002 Sheldon Wechsler Contact Lens Residency Award***

*Sponsored by Vistakon*

To promote the practice and development of the field of optometry by providing incentive and support to talented optometric residents who demonstrate a passion and commitment to practice, research and education.

**Dr. Leslie M. Coffee**                      Northeastern State University College of Optometry

***2002 George Mertz Contact Lens Residency Award***

Sponsored by Vistakon

**Dr. Amy C. Croteau**                      New England College of Optometry

***2002 Terrance N. Ingraham Pediatric Optometry Residency Award***

Sponsored by Vistakon

To promote the practice and development of the field of pediatric optometry by providing incentive and support to talented optometric residents who demonstrate a passion and commitment to practice, research and education in the field of children's vision.

**Dr. Melissa A Suckolo**                      New England College of Optometry

***2002 Vistakon Research Grants – \$25,000 and \$10,000***

To support basic or clinical research in the area of soft disposable contact lens.

**Patrick M. Ladage, B.Optom, Ph.D, FAAO and H. Dwight Cavanagh, M.D., Ph.D., FBCO**  
***“Corneal Epithelial Homeostasis in the Rabbit following Long-Term Daily and Extended Hydrogel Lens Wear”***

**M-L Chantal Coles, BSc, O.D. and Noel A. Brennan, BscOptom, MScOptom, Ph.D**  
***“Orbscan Measurement of Post-Lens Tear Film Thickness”***

***2002 Michael G. Harris Family Award for Excellence in Optometric Education***

To recognize an optometric educator who has demonstrated ongoing and consistent excellence in education of optometry students and/or advancement of optometric education.

**Dr. Douglas Penisten**                      Northeastern State University College of Optometry



Dr. Carol Lakkis, recipient of the 2001 \$25,000 Vistakon Research Grant.



Dr. Michael Harris (left) with Dr. Victor Malinovsky, recipient of the 2001 Michael G. Harris Family Award for Excellence in Optometric Education, at AOF's Research Luncheon in Philadelphia.

### ***2002 Glenn A. Fry Lecture Award***

To recognize a distinguished scientist or clinician for her or his current research contributions. The recipient is invited to present a special paper at the American Academy of Optometry's Annual Meeting.

**Dr. Raymond Applegate**      University of Houston College of Optometry

### ***2002 AOF Poster Award at SECO International***

The AOF Poster Award winners were assessed on the uniqueness of the topic, publishability, accessibility, and usefulness of the information to the average clinician. Readability, visuals, and reliability were also factors in judging the posters.

**First Place: Toxocariasis Previously Misdiagnosed as an Optic Nerve Coloboma**

Presented by: *Julie Torbit, O.D., FAAO and Brad Sutton, O.D., FAAO*

**Second Place: Occipital Cerebral Infarct with Presenting Visual Field Loss and Assumed Papilledema**

Presented by: *Makesha L. Sink, O.D. and Michael R. White, O.D.*

**Third Place: Acute Zonal Occult Outer Retinopathy (AZOOR): A case report and clinical summary**

Presented by: *Jennifer K. Bulmann, O.D. and Emily L. Livieratos, O.D.*



Dr. Eliezer Peli (left) with Dr. Robert Newcomb, AAO President, at the AAO Award Ceremony in Philadelphia. Dr. Peli was awarded the 2001 Glenn A. Fry Lecture Award for his research, "Treating with Spectacle Lenses: A Novel Idea!"



Dr. George Mertz (left), then AOF President, and Dr. Troy Tevis, President of IntraOptics, present Dr. Julie Torbit with the first place award for the 2002 AOF Poster Award at SECO International. Dr. Torbit won a digital slit lamp camera for her poster, "Toxocariasis Previously Misdiagnosed as an Optic Nerve Coloboma."



## Planned Gifts

### *An Investment in Optometry's Future*

Planned gifts benefit the American Optometric Foundation in the future and perpetuate long-term funding of optometric research and education. Planned gifts may be in the form of cash, securities, property, bequests, charitable gift annuities, and charitable trusts. A well-structured approach to giving will compliment your overall financial plan while generating greater benefits for AOF.

Planned gifts can be designated for general purposes, or restricted for a specific intent. Every student and researcher helped through the American Optometric Foundation is a tribute to the commitment of the special donors who support our mission each year.

### *Gifts By Will*

Contributions received through bequests are a vital part of our planned giving program and help endow future programs and initiatives. A donor may choose to designate the American Optometric Foundation as the recipient of a bequest through his/her will by naming AOF to receive a specific dollar amount or a percentage of the residual estate. Gifts by will enable a donor to make a significant contribution to AOF while retaining full control of his/her assets.

To include a bequest to the American Optometric Foundation in your will, we suggest this simple statement: "I give, devise, and bequeath to the American Optometric Foundation, 6110 Executive Boulevard, Suite 506, Rockville, MD, 20852, the sum of \$\_\_\_\_\_ (or \_\_\_\_\_% of my residual estate, or otherwise describe stocks, bonds, real estate, or other assets) to be used for general purposes (or describe a specific purpose)."

### *Legacy Society*

The Legacy Society recognizes the following individuals who have informed us that the American Optometric Foundation is designated as a beneficiary of a bequest through their will:

|                              |                                |
|------------------------------|--------------------------------|
| Anthony and Elna Adams       | William R. Jackson, Jr. Estate |
| Bill and Honey Baldwin       | Detleff and Lila Jans Estate   |
| Brett and Robin Bence        | Gerald and Andrya Lowther      |
| Irvin M. and Beatrice Borish | Fredric and Marion Rosemore    |
| Bert and Lydia Corwin        | Rose Salierno                  |
| N. Rex and Sandy Ghormley    | Sarita and Ashok Soni          |
| Sidney and Martha Greenberg  | Anonymous Donor                |
| Michael G. Harris            |                                |

## Major Gifts

*We express our deepest gratitude to the individuals and corporations whose support sustains the American Optometric Foundation. Their extraordinary generosity and leadership enable AOF to fulfill its mission.*

### **Founder's Circle**

The American Optometric Foundation's Founders Circle recognizes major supporters who contribute \$100,000 or more. This contribution can be in the form of cash, appreciated securities, or through a planned gift such as a charitable trust or future bequest. AOF extends its appreciation to its Founders Circle donors.

Irvin M. and Beatrice Borish  
William R. Jackson, Jr. Estate  
Fredric M. and Marion Rosemore  
Vistakon



Drs. P. Sarita Soni, Gerald Lowther, and Irvin Borish (left to right) enjoy the AAO Banquet in Philadelphia.

### **Presidents Circle**

The American Optometric Foundation's Presidents Circle was established in 1997 to recognize donors who contribute gifts of \$10,000 or more. This contribution can be in the form of a one-time gift or a long-term pledge. AOF is deeply grateful for the ongoing commitment from this special group of donors.

|                              |  |
|------------------------------|--|
| Anthony and Elna Adams       | George Mertz                                 |
| Neal J. Bailey               | Joseph and Linda Molinari                    |
| Bausch & Lomb                | Donald Mutti                                 |
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| CIBA Vision                  | Sarita and Ashok Soni                        |
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| Essilor                      | Richard Weisbarth                            |
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| Michael G. Harris            | Stanley J. Yamane                            |
| Richard and Patricia Hopping | Karla Zadnik<br>(In Memory of Karl R. Henry) |
| David and Alyse Kirschen     |  |
| Gerald and Andrya Lowther    |  |
| Timothy McMahon              |  |

## Contributors

### *Ezell Club*

AOF's Ezell Club is comprised of former Ezell Fellows who appreciate the importance of giving back to the program that had helped them during their post-graduate studies. As former Ezell Fellows, they understand how essential this program is in enabling deserving students to pursue their studies. AOF is truly grateful for the support it receives from this distinguished group of donors.

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| Barbara A. Fink      | Richard M. Hill  | Paulette P. Schmidt | Karla Zadnik         |
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| Susana TL Chung   | Alan N. Glazier      | Richard M. Hill | Gilbert E. Pierce    | Charles R. Stewart |                |



Mr. David Sattler (right), Director of Professional Services at Alcon Laboratories, presents a donation to Dr. George Mertz (left), then AOF President. Dr. Joseph Molinari (center) requested that Alcon donate his speaking honorarium from his presentation at The Southern Indiana Optometric Pharmacology Seminar.

*Sustainer (\$100 – \$249)*

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| Timothy Burrell     | Murray Fingeret     | Association          | John M. Nevelow       | Thomas O. Salmon     | Wayne W. Zimmerman    |
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Dr. Rodney Tahrán, VP Professional Relations and Clinical Affairs at Essilor, (center) poses with the 2001 Essilor Ezell Fellows, Drs. Jeffrey Walline (left) and Pete Kollbaum.

|                   |                    |                    |
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Mrs. Marion Rosemore (left) and Dr. Martha Greenberg participate in AOF's silent auction.

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Stanley J. Yamane      Dan O. Yoshii

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Dr. Karla Zadnik poses with the “Cinnamon and Rose” quilt, which she handmade and donated for AOF’s silent auction.

|                   |                   |                   |
|-------------------|-------------------|-------------------|
| Charles McQuarrie | Joseph C. Moore   | Michael Obremskey |
| Ralph F. Mead     | William L. Moore  | Leonard Osias     |
| Garland Melton    | Morton E. Muir    | James A. Palmer   |
| George W. Mertz   | Carl R. Muth      | W. W. Patterson   |
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| George M. Miyake  | Bernard A. Nickel | Robert P. Pharr   |
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|                       |                     |                      |
|-----------------------|---------------------|----------------------|
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| Arthur Queen          | Edward H. Shannon   | Thomas E. Tucker     |
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| Sam T. Roberts        | E. E. Smith         | Robert F. Williams   |
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| Robert B. Schwaner    | Michael J. Tamarkin |                      |
| R. Lewis Scott        | Samuel H. Templeman |                      |
| G. William Seabold    | Paul W. Thielking   |                      |

## Financial Summary

### July 1, 2001 – June 30, 2002

|                   | 2001 – 2002  | 2000 – 2001  |
|-------------------|--------------|--------------|
| Total Assets      | \$ 1,058,259 | \$ 1,106,196 |
| Total Liabilities | 6,708        | 12,262       |

### Net Assets

|                            |                     |                     |
|----------------------------|---------------------|---------------------|
| Board-Designated Endowment | 573,946             | 572,858             |
| General Unrestricted       | (146,577)           | (98,061)            |
| Temporarily Restricted     | 431,559             | 431,421             |
| Permanently Restricted     | 192,623             | 187,716             |
| <b>Total Net Assets</b>    | <b>\$ 1,051,551</b> | <b>\$ 1,093,934</b> |

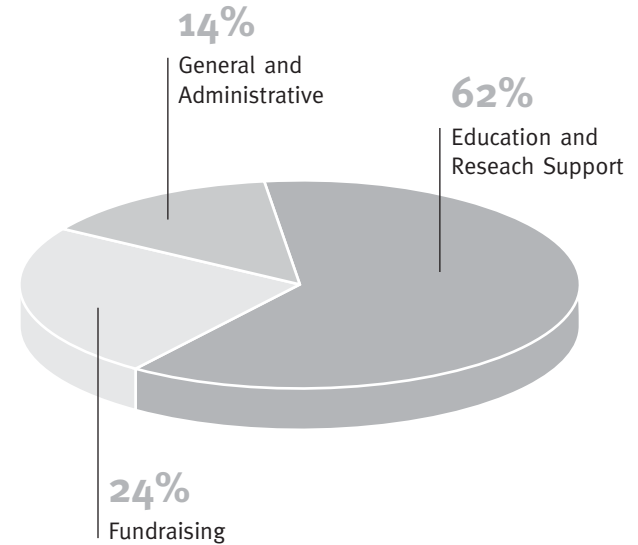
### Revenue, Support, and Gains

|  |                   |                   |
|--|-------------------|-------------------|
| Unrestricted                             | 124,006           | 170,779           |
| Temporarily Restricted                   | 218,732           | 237,432           |
| Permanently Restricted                   | 4,907             | 29,716            |
| <b>Total Revenue, Support, and Gains</b> | <b>\$ 347,645</b> | <b>\$ 437,927</b> |

### Expenses

|                                |                   |                   |
|--------------------------------|-------------------|-------------------|
| Education and Research Support | 243,112           | 236,754           |
| Fundraising                    | 91,676            | 98,807            |
| General and Administrative     | 55,240            | 63,986            |
| <b>Total Expenses</b>          | <b>\$ 390,028</b> | <b>\$ 399,547</b> |

### Fiscal Year 2002 Expenses



The American Optometric Foundation's audited financial statements may be obtained by writing to: American Optometric Foundation 6110 Executive Blvd., Suite 506 Rockville, MD 20852 USA



American Optometric Foundation  
6110 Executive Boulevard, Suite 506  
Rockville, MD 20852