



Assistance Fund  
MAKING ACCESS A REALITY

# IMPACT REPORT

2015



## OUR STORY

The creation of The Assistance Fund in 2009 was inspired by an all-too-common story of a patient at risk of not being able to afford the medication she desperately needed. Since our inception, The Assistance Fund has raised more than \$280 million to help more than 40,000 individuals with their prescribed therapies.

Our vision is to see the day when no person goes without medication due to an inability to pay. Until then, we exist so that patients don't have to miss a single medical treatment because of cost.

We are committed to our patients by ensuring they have the greatest access to their medical treatments as prescribed by their doctors.

# ABOUT US

## We Are Grateful

We are truly grateful to our individual and corporate donors who help us inch ever-closer to the day when no one will go without their prescribed medical treatments due to an inability to pay. You believed in our vision, and now you're generosity is changing the world, one life at a time. Our gratitude can hardly be expressed with words.

There are so many people who have supported The Assistance Fund in our mission. If you're one of these people, thank you. Whether you're a donor, provider, volunteer, or community partner, your role is essential. Our patients rely on your generosity, and you came through. You are the reason they received the medication that saved or improved the quality of their life.

On behalf of our staff, Board of Directors, and all the patients we serve, thank you for your generous support. We look forward to working with you in the future to make our vision a reality.

## Our Mission and Vision

Throughout 2015, we pursued our vision, stayed true to our mission, and continued impacting the lives of so many. Since our founding in 2009, we have stayed the course in "Making Access a Reality" for those in need. We continued easing the financial burden of those diagnosed with chronic or critical illnesses, making it possible for them to afford their prescribed medical treatments.

## Financial Highlights

In 2015, we saw revenue increase to **\$79,298,114** and with sound financial practices, we were able to ensure that **91%** of every dollar went directly to patient programming.

## Focus

As an independent 501(c)3 non-profit organization, we continued to focus, first and foremost, on the needs of patients and their treatment plan as prescribed by their doctor.

We offer assistance programs for copays, health insurance premiums and support other health-related financial needs. In 2015, our number of program funds grew to **29** and we impacted more than **17,000** patients.

## The Future

Moving forward we hope to increase our financial contributions so that we may positively impact the lives of even more patients as we branch into additional disease areas.



# LEADERSHIP

**Mark McGreevy**  
Executive Director

## Medical Advisory Board

**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

## Board of Directors

**Vince Schreiber, Board Chair**

Schreiber Development

**Lawrence Hatch, Vice Chair**

SunTrust Bank

**Jeff Milford, CPA, Treasurer**

Courtney Leasing

**John Fraley**

Orthomedx Corporation

**John Gravitte, Jr., Secretary**

AgileThought

**Justin Aronson, JD**

Greenberg Traurig

**Ada de la Osa, MSN,  
ARNP-BC, CPHON**

Florida Hospital Medical Group





# KEY MOTIVATORS

## Access

We help the most vulnerable patients **get access** to the medications they need.

## Independence

We support patients **independently** of the medication that was prescribed by their doctor.

## Patient-Centric

Our patient advocates deal directly with **hundreds of patients a day** to figure out how to get those patients the help they need.

## Regulation

We operate in line with **guidance** given by the HHS Office of Inspector General.

## Disease-Focused

Our funds provide patient support based on the **disease or condition** with which they have been **diagnosed** by their doctor.

## Operational Excellence

Our **innovative technology** and in-house **patient advocates** help patients have access to medical treatment within minutes of approval.



# VITAL PROGRAMS

- Ankylosing Spondylitis Copay Assistance
- Clostridium Difficile Associated Diarrhea Copay Assistance
- Crohn's Disease Copay Assistance
- Cystic Fibrosis Copay Assistance & Administration Assistance
- Digestive Motility & Malabsorption Disorders Financial Assistance
- Hereditary Angioedema Financial Assistance
- Infantile Spasms Copay Assistance
- Iron Deficiency Anemia Copay Assistance
- Juvenile Arthritis Copay Assistance
- Melanoma Copay Assistance
- Multiple Sclerosis Copay Assistance
- Multiple Sclerosis Health Insurance Premium, Travel & Incidental Medical Expense
- Myositis Copay Assistance
- Nephronic Syndrome Copay Assistance
- Neuroendocrine Tumors Copay Assistance
- Non-small Cell Lung Cancer Copay Assistance
- Parathyroid Disease Financial Assistance
- Parkinson's Copay Assistance
- Psoriasis Copay Assistance
- Psoriatic Arthritis Copay Assistance
- Renal Cell Carcinoma Copay Assistance
- Rheumatoid Arthritis Copay Assistance
- Sarcoidosis Copay Assistance
- Skin & Skin Structure Infections Copay Assistance
- Systemic Lupus Erythematosus Copay Assistance
- Ulcerative Colitis Copay Assistance
- Uveitis Copay Assistance



# IMPACT HIGHLIGHTS

## In-House Call Center & Patient Advocates

Responded to **106,142** calls

Assisted over **17,000** patients, achieving an **85%** renewal rate

Awarded an average grant of **\$4,700**

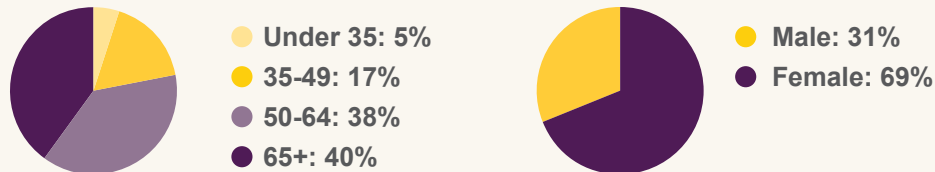
## Speed to Therapy

Our technology allowed patients to receive **immediate** eligibility determination

Patients accessed treatments within **minutes** of approval

Processed **114,709** claims

## Patient Demographics



Average household consisted of two individuals with income of **\$39,154**, and we served patients in **all 50 states** and Puerto Rico.

## Funds Raised

In 2015, The Assistance Fund increased contributions, raising **\$79,298,114** with **91%** of all dollars directly supporting patient programming.



# LIVES IMPACTED

## Sheri's Story



*I've been living with Multiple Sclerosis (MS) for almost 15 years. I was a young mother and wife when I was diagnosed in 2001, at the age of 33.*

My initial fears involved how is this going to affect me; would

I be able to walk, talk, see and continue to work and provide for my family? I also did not want my daughter's teen years to be about my MS.

Therefore, I took on a new dedication to my health including my therapies and being conscious about nutrition and commitment to regular exercise. I surprised myself by becoming a marathon runner, tri-athlete and cyclist — things I was not doing when I was healthy. Yet, I was doing them as someone with MS; living each day to the fullest with NO regrets and setting an example for my family.

Then, in 2009 I relapsed which left me with another neurological disorder known as Atypical Trigeminal Neuralgia. With fatigue, pain and vision difficulties, I had to leave my accounting career. This took away

my financial security, independence, and left me struggling with inadequate insurance coverage for my medication needs.

I was backed into a corner forced to make difficult financial and emotional decisions one should not have to make such as deciding between food and medication. I was able to take leave from my job before making the difficult decision of full disability. Then I began the long battle for Social Security, which took almost two years. It was necessary to cover family COBRA insurance, which literally made us bankrupt. My family was making decisions - tough decisions - I never dreamed we, or any family should have to face. It is so humbling to be put in this situation; selling off everything you own, just to ensure you are getting your medications. At times it was a balance between groceries and necessities or medical expenses.

Asking for help, was so hard!! But when you are desperate, you are desperate. I knew what not going on medications could do.

I was so thankful when I found The Assistance Fund and was approved for financial assistance for my medications. They have been a lifesaver for my family. We had nothing left to liquidate, and nowhere else to turn. I realized getting an illness can happen to anyone - and it happened to me. I was proactive and doing everything within my power to be healthy with my illness, yet it can still progress.

***“I was so thankful when I found The Assistance Fund and was approved for financial assistance. They have been a lifesaver for my family.”***

Today, I continue to take good care of myself and have been relapse free for 6 1/2 years. I continue to be committed to my health. Although I am no longer able to run marathons, I still enjoy 5Ks and my true passion is cycling and participating in the MS Bike series. I have participated in MS events in 26 states. I am a leader and advocate in the MS community. I speak tirelessly on the local, state and national level about MS and healthcare issues. American's are still stressed with a healthcare crisis. Currently, up to 35% of our gross income goes to medical premiums, medications and copayment expenses. More than double our mortgage payment.

Additionally, I volunteer for many committees and events and give of my time to make a difference and pay it forward. I can't thank The Assistance Fund enough for all they have done for me. Without their help, I would have been faced with

the heart-wrenching decision to stop my medication, as it just would NO longer be feasible to afford. There is a breaking point for all these costs. My family is so extremely grateful to you. I don't take it for granted, and I live each day to the fullest and in appreciation of this wonderful gift. It is helping me to live a good quality of life, as we look forward to a brighter future with MS. Thank you.

*Sheri*



# LIVES IMPACTED

Joe's Story



*“When I was diagnosed with Secondary Hyperparathyroid Disease, I couldn’t afford the medication, and not taking it was the only option I had—a terrifying option for sure.*”

The Assistance Fund stepped in and basically saved my health! It wouldn’t be possible without their generous help. I don’t know what I would do without them. When I tell my doctors about the Assistance Fund, they are in disbelief that a program this amazing even exists. Thanks also to all the staff at Assistance Fund that work with patients like myself!”

Joe



# Statement of Financial Position

June 30, 2015

## ASSETS

### Current Assets:

Cash and cash equivalents	\$	43,565,271
Investments		18,025,671
Contributions receivable		8,707,996
Prepaid expenses and other current assets		32,203
Property and Equipment, net		302,806

**Total Assets** \$ 70,633,947

## LIABILITIES AND NET ASSETS

### Liabilities:

Accounts payable and accrued expenses	\$	274,459
Claims payable		1,101,482
Deferred revenue		21,307

**Total Liabilities** \$ 1,397,248

Commitments and Contingencies —

### Net Assets:

Unrestricted		9,541,188
Temporarily restricted		59,695,511

**Total Net Assets** 69,236,699

**TOTAL LIABILITIES AND NET ASSETS** 70,633,947

# MOVING FORWARD

2016

- We will look to impact the lives of even more individuals as we continue to add services and secure additional funds to help more patients get the medicines they need to stay as healthy as possible for as long as possible
- Processes will be more streamlined with the continual evolving of our innovative technology
- A new look with a new logo and branding will be unveiled
- A new website will be launched by Fall
- The Assistance Fund will add staff and relocate to larger office space

**Thank You.**



# Assistance Fund

MAKING ACCESS A REALITY

**To learn more and make a difference  
with The Assistance Fund, call now or  
visit our website.**

4700 Millenia Blvd., Suite 410

Orlando, Florida 32839

Phone: 855-845-3663

Fax: 866-254-9411

[www.assistfund.org](http://www.assistfund.org)

The Assistance Fund (TAF) is a non-profit organization that provides support and financial assistance for individuals diagnosed with specific chronic or critical illnesses who lack the financial means to cover the cost-sharing portions of their prescribed treatments and life-saving care.

TAF's efforts are guided by the hope that one day, no person will go without medication due to an inability to pay.