

Impacting Lives. Transforming Communities. Bottom Line 2015 Annual Report

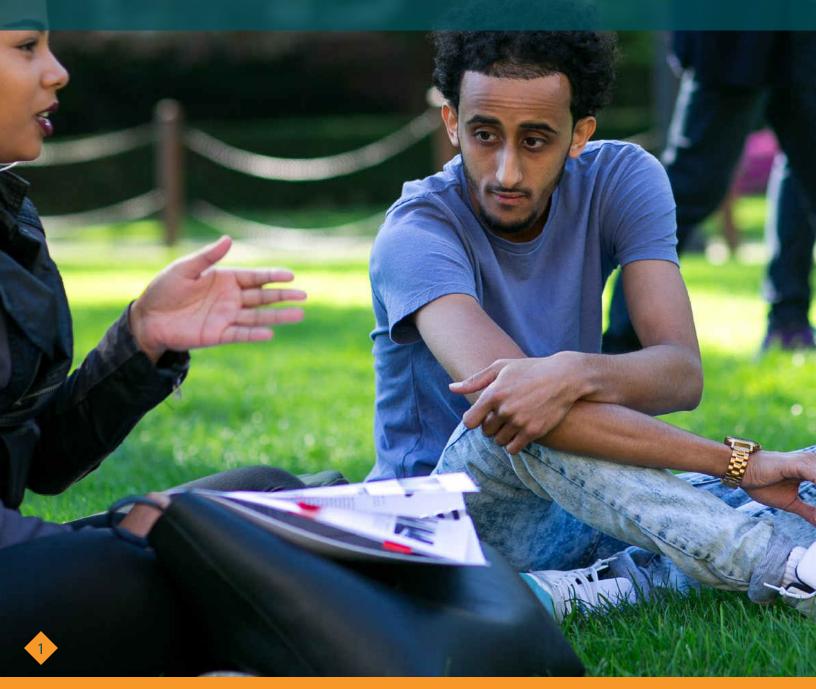
Mission and Vision

Bottom Line's vision is to dramatically transform urban communities by producing thousands of new career-ready college graduates. It will be achieved through our mission to help low income, first generation students get into college, graduate from college and go far in life.

Bottom Line Welcomes new CEO, Virgil J. Jones, Jr.

Virgil Jones becomes Bottom Line's third CEO, following Greg Johnson and Dave Borgal. Prior to joining Bottom Line, Virgil served as President of LINK Unlimited, a Chicago-based non-profit, for fourteen years. Under his leadership, the organization graduated over 1,000 students, tripled its revenue and completed a \$6 million capital campaign to fund new headquarters and established an endowment. Virgil earned an M.B.A. from Northwestern University, Kellogg School of Management, an M.A. in Pastoral Studies from Catholic Theological Union, and a B.S. in Psychology from Loyola University.







A message from the Chair of the National Board, Marc Smith **Dear Friends**,

Bottom Line has had an amazing eighteenth year. We're grateful for all of you who have supported us along the way, and above all, proud of our students; their successes are our fuel. They motivate every member on our team to give their best every day – because these students give their best despite many challenges. On behalf of Bottom Line, I'd like to thank all of our students for their hard work, commitment and determination as they strive for a better future!

Throughout this report we will share more about our accomplishments, but here are a few that I think best demonstrate the difference Bottom Line is making in the communities we serve.

- We launched our Chicago office and successfully worked with over 150 students in our first year.
- Since opening in 2010, our New York office celebrated their first group of college graduates and served over 1,100 students last year.
- Game changing investments were secured in Boston from State Street Foundation's "Boston WINs" initiative and The Boston Foundation's "Coaching for Completion" Social Innovation Fund grant.
- This current year we're working with over 5,000 students.
- And... despite our continued growth, once again, 83% of our students graduated from college a rate more than double the national average for the students whom we serve.

Yet, we continue to focus on organizational improvement. With this goal in mind, after an analysis of our team's strengths and in an effort to sustain our growth plans and simultaneously build our leadership team Greg Johnson has chosen to transition to a new role and will serve as our Chief Operating Officer. Over the last 12 years under his leadership, the organization has grown from serving hundreds of students annually to thousands. With this change we are thrilled to welcome Virgil Jones, Jr. as our new CEO, to work along with Greg, our Founder Dave Borgal, and the rest of the talented team. I am sure you will enjoy getting to know Virgil over the next year!

None of this would be possible without contributions from our key partners: the high schools and colleges our students attend; our corporate partners, who continue to pave the path for these young men and women as they graduate college and prepare to enter the workforce; our Board of Directors who are tireless advocates; and our supporters who enable us to strive toward realizing our vision. We thank you for your passion and your support.

Marc Smith Chair

The Problem

It's projected that within the current decade, between **1.4 million and 2.4 million** collegequalified high school graduates would be unable to earn a bachelor's degree.

By age 24, **77%** of students from the top income quartile earn a college degree. **Less than nine percent** of students from low-income families reach the same. While college graduation rates remain stagnant, by 2020 **65%** of US jobs will require postsecondary education, leaving a projected workforce gap of **23 million** workers.

29% of Chicago Public Schools freshmen will enroll in a four-year college and only 14% will graduate. Only **20%** of New York City high school graduates are earning college degrees, and under-represented students at public colleges are graduating from bachelor's programs at rates as low as **25%** over six years.

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The Commonwealth of Massachusetts is projecting a shortfall of up to **65,000** college degrees from public universities, compared with a workforce need predicted from 2015-2016.

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College Access Program

Bottom Line provides personalized one-on-one guidance through the entire application and decision process utilizing a six-step system to help high school students GET IN to a college that fits academic, social and financial needs.

- Last year, 97% of Bottom Line students were accepted into college.
- Bottom Line worked with 1,040 high school students during the past year.

Bottom Line counselors work with high school seniors after school and on weekends in local counseling centers to help them get into college by providing one-on-one, expert guidance through every step of the college application process. Counselors work with students to create a college list, brainstorm and write essays, submit applications, secure financial aid and choose a college which they can afford and where they can succeed.



Sarah Sanchez grew up on the south side of Chicago. She excelled in school where many of her peers did not. Sarah joined the Bottom Line Access Program her senior year to learn about the college application and financial aid process, and to gain the confidence to be the first in her family to attend a four-year university.

Throughout, she remained an engaged, self-sufficient student and was nominated by Bottom Line to participate in the First Lady's Reach Higher initiative for college-bound, low-income students. For the Reach Higher "Beating the Odds Summit," Sarah traveled to the White House, participated in workshops with 140 other students and met the First Lady and President Obama. She has continued as an active participant in Bottom Line through the Success program and currently attends the University of Illinois at Chicago as a recipient of a CPS scholarship.

"I need Bottom Line because I don't really have anyone to guide me through the college and scholarship process. By having access to this program I know I would be able to attend a great college and later on be able to help my younger brother and other family members do the same."

Sarah Sanchez, Chicago University of Illinois at Chicago `19



College Success Program

The College Success program features one-on-one, on-campus support for each student for up to six years using a 4- tiered support model (DEAL) to give students the tools and support they need to succeed.

In college, students meet with their counselor regularly, and are assessed every semester according to DEAL program benchmarks (**D**egree, **E**mployability, Financial **A**id and **L**ife). Based on these assessments, counselors create an individualized learning plan to ensure that each student stays on track to graduate. This is completed each semester for up to six years for each student.

Impact:

- 83% of the most recent class of Bottom Line students graduated from college within six years.
- 2,854 college students received on-campus support during the last school year.
- 74% of students who graduated during the 2014-2015 academic year had a career-relevant opportunity or were enrolled in graduate school within three months of receiving their diploma.

Meet Orlando

Orlando Geigel is among the first class of Bottom Line's New York program to graduate from college, but his path to success was not always so promising. After attending high school in the Bronx, Orlando started college at a two-year program where he struggled academically. A friend told him about Bottom Line and he recognized that he needed help if he were to make it to graduation.

Bottom Line helped him to transfer to Lehman College and later to SUNY Potsdam for a full-college experience. Orlando graduated with a degree in Psychology and currently works for City Year as a fifth grade teacher back in the Bronx at P.S. 75.

"I still remember my first semester of college. I ended up with a 1.6 GPA. I thought I was going to drop out and work at Starbucks. But I didn't. During that spring semester, I was at Bottom Line almost every single day getting back on track. They became like a family to me. And this past spring, I walked across the stage with a degree in my hand and a smile on my face."

Orlando Geigel, NYC SUNY Potsdam '15



Meet Alana

Alana learned the value of hard work from her mother, who provided for her family and raised three kids on her own despite suffering from domestic violence. Alana sought to follow in her mother's academic footsteps, and attended Bridgewater State University, only to learn that her mother had been diagnosed with cancer soon after she enrolled.

Alana moved back home and began commuting to her classes while taking care of her younger sister. When her mother lost her struggle with the illness, Alana continued pushing herself to earn her degree. She turned to Bottom Line to help her through those difficult years and graduated with a degree in Accounting. This past summer, Alana accepted an internship in State Street's L.E.A.D. program through a Bottom Line partnership.

"While I was dealing with funeral plans, preparing to move, caring for my sister, and catching up with all of my classes, Bottom Line stepped in to help. My Bottom Line counselor secured my financial aid and helped me submit paperwork to switch my major. All of the things I wanted to do on campus I couldn't do because I had other responsibilities at home. My Bottom Line counselor was there to help fill in the gaps."

> Alana Hans-Bodden, Boston Bridgewater State University '15

Corporate Partnerships

Helping low-income and first-generation students to earn a college degree fosters economic equality and enables them to compete in a difficult job market. By closing the achievement gap, Bottom Line transports low-income and first-generation students from places of limitation to places of possibility. Our corporate partnerships are instrumental to achieve this mission and we're proud to be supported by many national and local organizations.

"State Street's relationship with Bottom Line is helping us to achieve our goal of attracting the best talent, while nurturing a diverse and inclusive work force."

Alison A. Quirk Executive Vice President and Chief Human Resources Officer and Citizenship Officer State Street

Partnership Highlights

- Chicago hosted its first Career Impact Day with Deloitte last June with 50 students and Deloitte staff participating in a day-long professional development workshop.
- As part of the Boston WINs Initiative, the State Street Foundation is providing an investment of \$4 million over four years to Bottom Line along with four other community-based organizations. This financial support is enabling Bottom Line to significantly scale their respective programs and together create better outcomes for Boston's youth. State Street is committed to hiring 1,000 Boston students that will have been served by one or more of the WINs organizations over the next four years.
- Sapient GM hosted a career event for New York students in November 2014 and hired 2 rising seniors as summer interns. Both students were offered full-time roles beginning June 2016.



"My internship at National Grid showed me the lifestyle I could potentially have after I graduate from college. At Worcester Polytechnic Institute, I learned theory and engineering skills. My internship provided me with the opportunity to apply these skills and make connections with leaders in the field."

Hector Bottom Line Student, Class of 2015 (MA)

"Our longstanding partnership with Bottom Line supports one of the most important goals we have at Viacom: to inspire future generations of leaders. We're continually impressed by the caliber of Bottom Line interns that come to Viacom and the depth of their selection process to find the right fit for our company."

Essence Dashtaray Campus Recruiter, Human Resources, Viacom

Top Corporate Partners 2014-2015

Massachusetts

State Street Vertex National Grid Liberty Mutual Walmart John Hancock Stop & Shop Sun Life Financial UMass Memorial Royal Bank of Canada Boston Red Sox Bowditch & Dew<u>ey</u>

New York

Viacom Sapient Legg Mason Alcoa Barclays Forest City Ratner Companies Double S Management BlackRock Sudler & Hennessey Greenhill & Co. McKinsey & Company Morgan Stanley

Chicago

Deloitte 270 Strategies CFI Partners



Massachusetts Year in Review

Bottom Line Massachusetts had an extremly successful year. In adition to serving more than 2,600 students through our Access and Success programs, Bottom Line engaged the community and received increased media attention. Governor Charlie Baker and Lieutenant Governor Karyn Polito held focus groups with Bottom Line students and Board Members at our Jamaica Plain office. We received significant profiles in the Wall Street Journal and the Boston Globe; and we held 74 outreach events along with a series of community discussions.

99.5% or 622 of Bottom Line's high school Access students were accepted to at least one college; and averaged **five** acceptances per student.

12 Boston Marathon runners raised **\$180,000** to support Bottom Line, our most successful athletic fundraiser to date.

Our Ambassadors program launched for high school and college students across all three MA sites. A Bottom Line alumna from our first graduating class, Christal Fenton-Fortes, joined the Bottom Line MA Board.

Partnership Highlights

State Street continues to be one of Bottom Line's largest corporate partners. In addition to supporting Bottom Line through the WINs initiative, State Street served as the presenting sponsor of Bottom Line's 2015 Get in, Graduate, Go Far dinner and Alison A. Quirk, Executive Vice President and Chief HR Officer served as the event chair. Multiple executives have served on Bottom Line's Massachusetts Board of Directors or committees and more than 100 State Street employees served as career volunteers at our Annual Go Far Forum event. During the 2014-2015 academic year, 25 Bottom Line students served as interns or became full-time employees at State Street.



Looking ahead...

We will continue to participate in local civic and private initiatives focused on improving education and workforce outcomes.

We plan to grow the number of students we support, serving about 3,000 students during the 2015-2016 academic year, including a pilot cohort of students beginning at community colleges.

We will continue to work with local employers as part of our College to Career Pipeline initiative to support our students and meet the hiring needs of employers and the current workforce.

We will focus on on ensuring that Bottom Line's growth is sustainable for the long term.

74.3% of students who graduated during the 2014-2015 academic year had a career-relevant job opportunity or were enrolled in graduate school within 3 months of receiving their degree.

In the fall, Board Member, Michele Scavongelli, was honored as a Patriots "Difference Maker."

2,001 college

students were served through Bottom Line's Success Program. Of these students, **244** entered our program through the Success Direct pipeline.



July 2014

19 new counselors were hired and began working with students!

August 2014

More than 200 students attended "Send Off" events in Boston and Worcester to celebrate the start of their college career.

September 2014

Success counselors began meeting in-person with more than 2,000 students on 20 colleges across Massachusetts, while Access counselors began supporting more than 600 students through the application process.

October 2014

Bottom Line's Get In, Graduate and Go Far Reception in Worcester doubled previous revenue and honored Tim Murray.

December 2014

Bottom Line Access students submit more than 5,000 applications to more than 300 colleges across the country.

January 2015

More than 300 Success Students from Worcester and Boston attended the annual "Go Far Forum" career events where corporate partners recruited students for internships and entry-level roles.

March 2015

With special guest Governor Charlie Baker, Bottom Line launched its 3rd Annual College Expo which helped high school students make an informed decision about the college they want to attend.

April 2015

Under the leadership of Alison Quirk, Executive Vice President and Chief Human Resources and Citizenship Officer, the 10th Annual Get In, Graduate and Go Far Dinner raised more than \$1 Million, our single-largest source of unrestricted funding.

May 2015

Our Worcester, Jamaica Plain and Dorchester offices hosted "star parties" to celebrate our high school students' enrollment in college.

June 2015

Bottom Line celebrated the more than 230 college graduates at the annual Recognition Night. They joined a network of more than 1,100 Bottom Line alumni.

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New York Year in Review

Since opening the Bottom Line New York office 4 years ago, we have grown our program from serving 150 students to over 1,100 this past year. Bottom Line has built strong relationships across New York City - from high schools and colleges, to foundations and corporations. We're thrilled to share with you some of our key accomplishments from the 2014-15 school year.

92% of our first-year college students re-enrolled for a third semester.

Our College Access students submitted an average of **16** applications and were accepted to **8** schools.

With the help of JFEW and the Aronson Family Foundation, Bottom Line provided **\$100,000** in internship stipends to support students working in non-profits and other unpaid internships.

58% of eligible students were accepted into opportunity programs which provide full funding.

Looking ahead...

We know that there are tens of thousands of New York City students who could benefit from our support. To that end, Bottom Line is looking to grow our impact through:

- Increasing the number of students we serve to over 2,500 students by 2018.
- Deepening our partnerships with the colleges we serve so that we can serve our students most effectively and efficiently.
- Continuing to build partnerships with local industry and employers to help provide career exposure and internship opportunities to hundreds of Bottom Line students over the next few years.



Powerful Partnerships

In a city where only half of high school students enroll in college, and only one in five students earns a college degree within 12 years of entering college, our work to support students all the way through college is immensely important. We know we can't do it alone, so Bottom Line partners across sectors to reach greater numbers of students with the most effective programming possible:

- Bottom Line works closely with high school guidance counselors in all five boroughs to recruit students for our Access Program and ensure that they remain on track throughout the year.
- In our College Success Program, our target college model allows us to serve students more effectively by becoming experts at the colleges we serve - but we've taken this one step further by formally partnering with CUNY City College to work with 100 first-year students in our dedicated office on campus.
- Now that our students are becoming juniors and seniors in college, we work with companies in many industries to offer career-relevant work experiences to prepare students to secure employment after graduation.
- Through our Success Direct program, we provide college persistence support to hundreds of students each year from organizations around the City that do not have the capacity or expertise to provide this type of support to their students once they enter college.



July 2014

8 new counselors were hired to serve 1,130 students and the career program in New York began with 63 juniors and seniors.

August 2014

We received a \$200,000 grant from the State of New York's Higher Education Services Corporation, which provides grants to low-income students. 400 new college firstyear students were sent off to their first semester of college and continued to work with existing college students.

October 2014

The first young professionals event, Bottoms Up! for Bottom Line took place.

December 2014

Our Bottom Line Access students submit more than 4,500 college applications.

January 2015

The Go Far Forum serves almost 200 students with 100 volunteers from Viacom, Jet Blue, Google, American Express, CVS, Sapient and more.

March 2015

The first student-led College Fair took place.

April 2015

We partnered with CUNY – City College to serve 100 first-year students in 2015-2016. 41% of our high school students were accepted into Opportunity Programs, which provide full financial support to students, and we were selected as the Americas representative for the Barclays Citizenship Award and received \$65,000.

May 2015

The 4th annual Spring Reception brought together over 300 guests and raised \$460K for our programs.

June 2015

Our first Recognition Night honored our first graduating class of 7 graduates.

Chicago Year in Review

Bottom Line Joins A Better Chicago's Portfolio

A Better Chicago is a venture philanthropy fund focused on dramatically improving educational outcomes for low-income Chicagoans by finding and scaling the most effective nonprofits in the region. A Better Chicago announced a \$100,000 seed grant to help Bottom Line launch in Chicago and establish itself in the city. Moreover, A Better Chicago has offered the Chicago Executive Director customized management support through strategic planning and other special projects to help ensure the long-term success of the office.

In our first year, we served **150** high school and college students. **100%** of our Access program students enrolled in college.

96% of our Success Program students persisted into the second year.

CFI Partners Fellowship

Chicago Regional Board Member, Brad Couri, helped develop and pilot a new summer fellowship program for Success Program students to support their early career development. A small group of students participated in a series of five workshops with professionals from a variety of backgrounds and a range of industries. These professionals talked to students about their career path and their day-to-day responsibilities so that students could assess their interest in different fields.

For many of our participants, this experience was their first in a corporate setting. Each student received a \$1,200 scholarship from CFI Partners to offset their college expenses, as well as one-on-one resume feedback.



White House Event

Two Bottom Line – Chicago students, Sarah Sanchez and Jacob Romero, were selected to be among 140 students invited to attend the "Beating the Odds" Summit this past summer. The Summit brought college-bound high school graduates from all over the country to the White House for a special two-day event hosted by the First Lady. The Summit celebrated the success and promise of students like Sarah and Jacob while introducing them to basic tools needed to succeed at the college level.



Expanding Our Impact

The Bottom Line – Chicago team has grown dramatically from 4 to 8 staff members in the past year. Looking forward, we plan to scale our reach by more than doubling the number of students served this year to 350 with the goal of reaching nearly 2,500 students by 2020.



July 2014

We launched Bottom Line - Chicago, opened our office to students on July 7, and held our kickoff celebration. We also received our first A Better Chicago grant.

August 2014

WGN-TV in Chicago visited the office.

September 2014

Staff and students attended a White Sox baseball game, with tickets donated by White Sox Charities.

October 2014

We held our first local care package day to prepare care packages for students. Additionally we were visited by the Dell Scholars Program.

December 2014

Greg Darnieder, Senior Advisor to U.S. Secretary of Education Arne Duncan visited Bottom Line and discussed the College Access Initiative at the U.S. Department of Education.

January 2015

Executive Director Chris Broughton was interviewed by WGN-TV Chicago. We also held the first meeting of our Regional Board of Directors.

February 2015

We held our first local off-site staff retreat.

April 2015

Success Program students at the University of Illinois at Chicago came together for a bowling social.

May 2015

We celebrated the first local college signing day where Access Program students announced their college choices. One of our Success program students was featured as part of A Better Chicago's benefit.

June 2015

Students and staff participated in Deloitte Impact Day 2015, and two Access Program students were selected to attend the "Beating the Odds" summit at the White House. Additionally, we held a fundraising breakfast hosted by the Pritzker Traubert Family Foundation.





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Empower

*Education is our passport to the future, for tomorrow belongs to the people who prepare for it today."

Malcom X

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Celebrating a Decade of Support from Liberty Mutual

Liberty Mutual first supported Bottom Line in the fall of 2006 and continues to be one of our most generous and consistent partners with contributions totaling almost \$700,000. Over the past decade we have relied on their partnership, support, expertise, and employees to help us achieve our goals. We value your leadership and we appreciate your commitment to helping improve the community.

Each year Liberty Mutual has been a leading sponsor of our Go Far Forum, a signature career event designed to help students gain valuable professional skills and experience. Employees volunteer as mock interviewers and serve as round table discussion leaders helping students gain valuable insight into career possibilities. Along the way Liberty Mutual has turned into one of our strongest career partners and provided opportunities for Bottom Line alumni to begin their careers.

Bottom Line alumni like Rosyana Cardoso, a Project Leader in their Global Pricing and Analytics Center, started as a Liberty Mutual intern in 2008, and Colleen Trinh, a Senior Claims Specialist began as a Claims Case Manager in 2012. Most recently, Liberty Mutual awarded Bottom Line with a generous 2-year \$110,000 grant to support Bottom Line's Boston Growth Campaign.

Thank you, Liberty Mutual, for your longstanding support and for your vision in recognizing how together, we could help thousands of students Get In, Graduate, and Go Far!

Bottom Line Get in • Gradua Success depends on you





Bottom Line Leadership

Virgil J. Jones, Jr. Chief Executive Officer **Greg Johnson Chief Operating Officer** Chief Program Officer / Founder Dave Borgal

Ruth Genn Chris Broughton

Mike Wasserman Executive Director – Bottom Line - Massachusetts Executive Director - Bottom Line - New York Executive Director – Bottom Line - Chicago

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2	Hill Holliday	Dave Sanford	EVP of Client Relations, WinterWyman
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\$100,000 +

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\$1,000 - \$4,999

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In Kind

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Elaine Evans Thomas Fallon Christal Fenton-Fortes Fireplace Restaurant Scott Forbes and Gina Ventre Gather and Brew Godiva Gooey&Co Grafton Group Gran Electrica GrandTen Distilling Nicole Greene The Hanover Theatre Harpoon Brewery Hawthorne Bar and Restaurant Henrietta's Table Hill Hollidav Hilton Garden Inn **Katherine Huang Hubway Bikes** Hungry Mother Restaurant The Huntington Theatre Company Chef Andy Husbands & Tremont 647 **Hy-Line** Cruises insignia Athletics Institute of Culinary Education iRobot Corporation Isabella Stewart Gardner Museum Island Creek Oyster Bar **Island Queen Ferry** J.P. Licks Jean-Pierre Jacquet* Jillian's / Lucky Strike Boston Jillian's of Worcester **Kayem Foods** Kelley Green Golf Course & Tides Restaurant **Kiel James Patrick** The Kirkland Tap & Trotter **Kramer Portraits** Kripalu Center for Yoga and Health Lake Compounce Water Park Squam Lakes Natural Science Center Larz Anderson Auto Museum LaserCraze The Lewis Family Foundation Life & Style Loon Mountain Resort Lyric Stage Company M.J O'Connor's The MacPhee Family Magic 106.7 The Maidstone Mandarin Oriental, Boston Manna Massage Peter and Valorie Markarian Martignetti Companies MASS MoCA Drs. Owen Mathieu & Eileen Haley Mathieu Mercer Mindy Bacharach Yoga Mondrian LA Viola and Richard Morse The Foundation To Be Named Later **NBCUniversal** New Balance

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Statements of Financial Position*	2015	2014
Cash and cash equivalents	2,884,939	3,281,852
Pledges receivable	3,772,440	1,905,978
Prepaid expenses & other assets	71,393	100,113
Assets	6,728,772	5,287,943
Property & Equipment (less depreciation)	219,918	287,785
Other assets	1,007,272	1,078,533
Total Assets	7,955,962	6,654,261
Current liabilities	361,652	409,487
Deferred rent	167,925	45,438
Net Assets	7,426,385	6,199,336
Total Liabilities and Net Assets	7,955,962	6,654,261

Statements of Activities**	2015	2014
Revenue and Support	8,765,617	6,239,307
Program Services	5,862,698	4,334,621
Administration	676,312	528,691
Fundraising	999,558	819,860
Expenses	7,538,568	5,683,172
Change in net assets	1,227,049	556,135
Net assets, beginning of year	6,199,336	5,643,201
Net Assests, End of Year	7,426,385	6,199,336

Statements of Cash Flows **	2015	2014
Net cash provided by operating activities	(364,288)	717,025
Net cash used in investing activity	(32,626)	(170,952)
Net increase in cash	(396,914)	546,073
Cash $arepsilon$ cash equivalents, beginning of year	3,281,853	2,735,779
Cash and Cash Equivalents, End of Year	2,884,939	3,281,853

* June 30, 2015 & 2014 ** For the period from July 1, 2014 - June 30, 2015 & July 1, 2013 to June 30, 2014



Massachusetts Office

Bottom Line 500 Amory Street Suite 1 Jamaica Plain, MA 02130

Chicago Office Bottom Line 65 E. Wacker Place Suite 800

Chicago, IL 60601

Bottom Line 44 Court Street

New York Office

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