

FISCAL YEAR 2024-2025

THE WHARTON FUND

Investor's Report



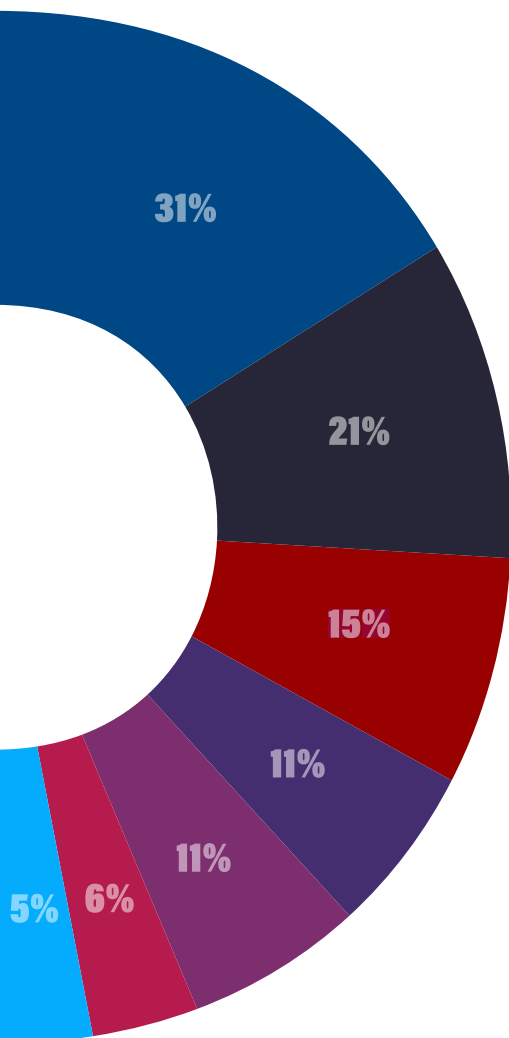
THE WHARTON FUND

Investor's Report

The Wharton Fund is the Wharton School's unrestricted giving fund that supports existing programs and initiatives while also serving as the seed money for innovative new ventures. Thanks to the many generous annual donors to The Wharton Fund, the School can meet its immediate needs and respond quickly to unexpected opportunities.



Unrestricted giving to Wharton provided support to the following programs and initiatives during the 2023-2024 academic year:



MBA Financial Aid (31%)

MBA Financial Aid made the Wharton experience more accessible and affordable.

Technology and Digital Resources (21%)

Enhancements to the School's digital infrastructure proved crucial as the Wharton community continued to thrive in hybrid learning and work environments.

Administrative Departments (15%)

Responsible for promoting the Wharton brand and keeping alumni connected to the School, our administration played a pivotal role in our ongoing growth.

Facilities (11%)

Investments in the School's facilities ensured that Wharton's learning environments positioned students for success on their academic journey.

Student Programming (11%)

Woven into the framework of a Wharton degree, experiential learning opportunities played a key role in strengthening the team-building and problem-solving skills of Wharton students.

Global Research and Initiatives (6%)

Global educational initiatives, like Global Modular Courses, turned the world into a classroom for Wharton students.

Research Initiatives (5%)

From Wharton People Analytics and the Behavior Lab to the School's groundbreaking advancements in AI, Wharton has remained a thought-leader at the forefront of business and innovation.

THE WHARTON FUND

Your Impact



\$13M

total dollars raised from
Benjamin Franklin Society
members in Fiscal Year 2024.

70%

of Wharton Fund dollars were
raised from members at the
Founder Level (\$10,000-\$25,000)
or above. **This is a 4% increase
over last year.**

71%

of Benjamin Franklin Society
members were also members of
The Wharton Fund Loyalty Society.

253

supporters joined the
Benjamin Franklin Society
in Fiscal Year 2024.

THE WHARTON FUND

Class Giving Highlights



1,584 = \$4.1M

Reunion Alumni Donors

Total Dollars Raised



54%

*of Reunion Classes **exceeded** their
fundraising goals in Fiscal Year 2024.*



66%

*of members of the Full-Time MBA Class of 2024
contributed to their **Class Gift Campaign**.*



THE WHARTON FUND

Advancing Alumni

Lifelong Learning opportunities serve Wharton alumni throughout their professional journeys with invaluable resources — online, on-campus, and in regions worldwide.

In the 2024 fiscal year, Lifelong Learning fully integrated a new platform for webinar production that provides a smoother, more responsive user interface. Powered by The Wharton Fund, this enhancement ensures Lifelong Learning can continue to bring timely research and discoveries to Wharton alumni.

Webinar highlights from Fiscal Year 2024:

9 —> Webinars offered by Lifelong Learning.

1,795 —> Webinar attendees.


Topics Covered —> Generative AI, corporate culture, the future of human labor, and more.

A Wharton degree provides alumni access to many valuable resources. From career services to annual reunions, Wharton remains committed to supporting its alumni throughout their professional journeys.

1,300 —> Number of alumni who received Career Coaching sessions.

10,800 —> Number of alumni who utilized the alumni career website, home to over 80 unique resources.

3,000 —> Attendees of MBA Reunion Weekend in May 2024. Backed by The Wharton Fund, Reunion showcased over 50 unique events.



“Absolutely fantastic webinar. Thank you so much for the presentation. This gave me a lot to think about and piqued my interest to learn more.”

- Lifelong Learning Webinar Attendee

THE WHARTON FUND

Championing Experiential Learning

MBA Leadership Venture

Backed by The Wharton Fund, MBA Leadership Ventures are designed to strengthen students' team-building and problem-solving skills through challenging, physical, and hands-on exercises

Divided into either week-long Expeditions or overnight Intensives, Leadership Ventures are one of Wharton's core experiential learning opportunities available to students looking to augment their classroom lessons and step out of their comfort zone.



12 MBA Leadership Ventures offered by the Wharton School.

“I feel immense gratitude for The Wharton Fund, which fuels incredible experiences – like my Patagonia Leadership Venture – for students like me.”

JAKE PENCE, WG'25

Last year, MBA student, Jake Pence, participated in an Expedition Leadership Venture to Patagonia. Jake's transformative experience culminated in him and his classmates constructing their own rafts to navigate down rivers, strengthening their team-building skills in a dynamic real-world environment.

Supported by The Wharton Fund, MBA Leadership Ventures are a unique hallmark of the Wharton experience that have a profound impact on students, enhancing their personal and professional growth.

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Championing Experiential Learning

Global Immersion Programs

Supported in part by The Wharton Fund, Global Immersion Programs (GIP) provide students with insights into the unique economic, cultural, and political factors shaping key regions of the global economy. Students learn the language of global business to be equipped for challenges of the international business world.

Launched in 1993, more than 2,500 MBA students have participated in a GIP. Through faculty lectures and international travel, students engage with local business leaders, government officials, and Wharton alumni, gaining valuable insights, immersing themselves in another culture, and strengthening bonds within their cohort.

Last year, MBA student Haider Abbas participated in a GIP to South Korea. Haider credits his unique learning experience with helping him cultivate a global mindset — a crucial attribute for future leaders.

Powered by The Wharton Fund, Global Immersion Programs prepare students for the international business environment, creating the next generation of global leaders.

“Leadership support fuels transformative experiences – like Global Immersion Programs – and I’m deeply grateful for it.”-

HAIDER ABBAS, WG’25



THE WHARTON FUND

Sparking Innovation

Wharton Behavioral Lab

The Wharton Behavioral Lab (WBL) provides world-class support to help Wharton faculty and students explore fundamental questions about human thought, behavior, and decision-making. Powered by The Wharton Fund, the goal of WBL is to enhance research productivity by minimizing operational costs in terms of both time and money.

Since 2005, WBL has provided Wharton faculty and doctoral students with dedicated research environments to test their theories. WBL accelerates the exploration of business-related issues by providing the latest tools and learning technologies for behavioral and experimental studies while pooling resources from across Wharton to lower operational costs.

Supported in part by The Wharton Fund, the scale of the Wharton Behavior Lab enables Wharton to efficiently and profoundly boost the School's research productivity.

33 → Articles published by Wharton Behavioral Lab.

74 → Active researchers, comprised of 55 faculty and 19 students.

7 → Engaged academic departments, including Marketing; Management; Operations, Information, and Decisions; Accounting, and Psychology.

“The Wharton Behavioral Lab has made my most ambitious research possible. It’s an incredible resource for faculty and doctoral students and makes us the envy of all our peers at other elite business schools.”

KATY MILKMAN

JAMES G. DINAN ENDOWED PROFESSOR,
PROFESSOR OF OPERATIONS,
INFORMATION, AND DECISIONS





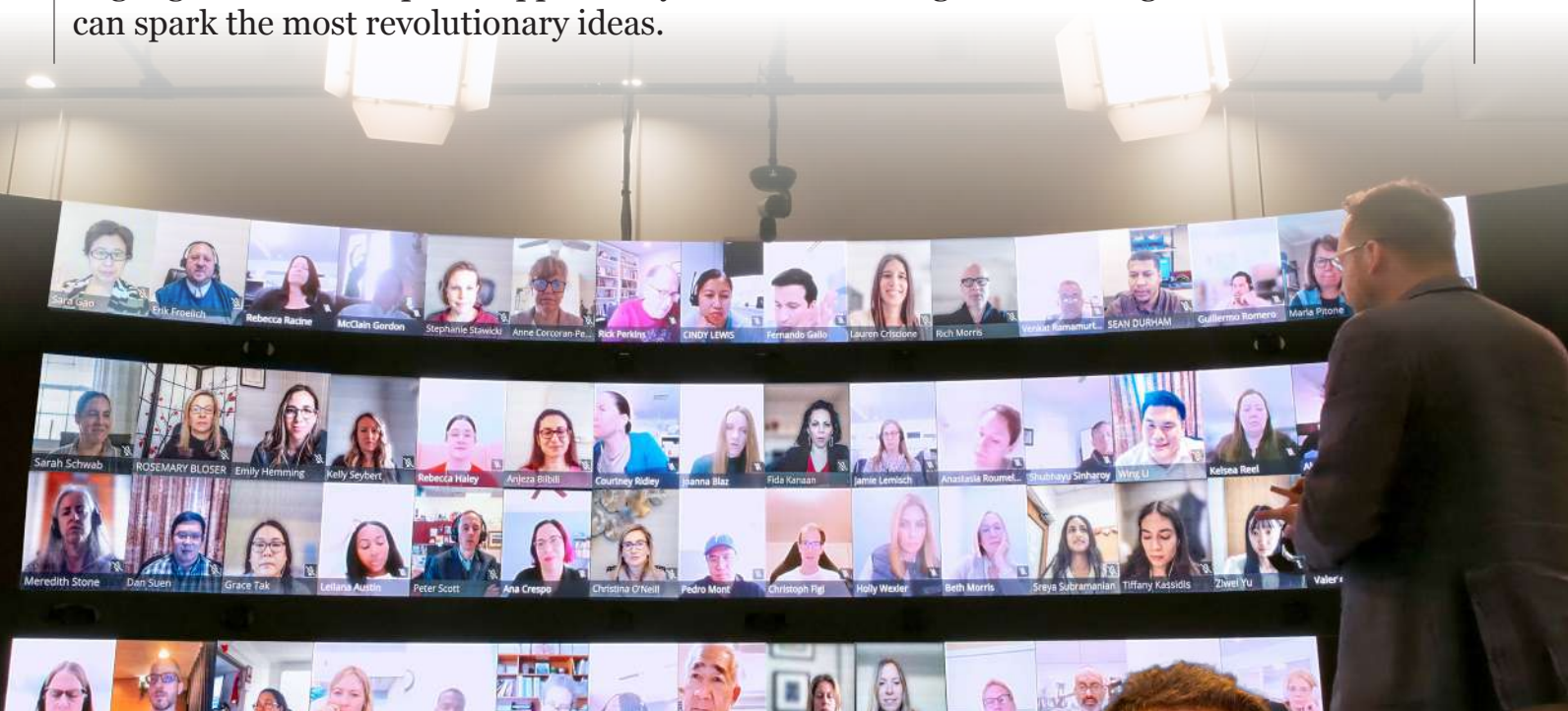
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Powering Exclusive Alumni Opportunities

Inside Wharton Magazine

This past November, donors to The Wharton Fund were invited to an exclusive Inside Wharton Magazine immersive virtual event with Professor Gideon Nave. Using the School's state-of-the-art WAVE Classroom, donors went beyond the pages of Wharton Magazine's Whiteboard feature on Professor Nave's strategies for sparking creative ideas.

Over 80 alumni and friends of Wharton tuned in to hear Professor Nave's presentation. Highlights from this special opportunity included learning how thinking "inside" the box can spark the most revolutionary ideas.



Thank you so much for your generous leadership support of **The Wharton Fund.**

Look out for more exclusive opportunities and events — like **Inside Wharton Magazine** — that are a benefit of your membership in the **Benjamin Franklin Society.**



THE WHARTON FUND

Message from the Senior Director

As Senior Director of The Wharton Fund, it is a privilege to thank you for your generosity and leadership.

Your annual gift plays a vital role in supporting Wharton's mission. Unrestricted gifts — like yours — are put to immediate use and are spent in their entirety each year. Through your contribution, Wharton can continue to provide programming that cultivates ethical leaders, fuels data-driven research, and champions the future of innovation.

I hope the student testimonials and in-depth look at Wharton Fund-powered initiatives in this report provide further insight into the difference your support makes.

Thank you once again for your partnership and dedication to Wharton's success. Your investment has a lasting impact.

All my best,



Beth Truta Morris
Senior Director, The Wharton Fund
External Affairs



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