



Living Legacy Fund

SRC Living Legacy Fund 2018 - Annual Report

Gratitude — Circles of Caring

Message from the Chairman

The Living Legacy Fund was established by Odd Fellows Home of California and the SRC Residents' Council as the only tax-exempt charity under OFHC's IRS 501(c)(3) tax exempt umbrella. It's mission "is to generate resources with which to fund the enrichment of the quality of life within and affiliated with SRC". In addition, "the Board of Directors of OFHC has determined that the following uses comply... with the LLF agreement": educational grants, residence assistance and general fund.

In 2018 we awarded 44 Educational Grants for a total of \$107,215 to employees and their children to attend college throughout the United States, with majors from occupational skills to advanced academic degrees.

LLF has received many heart-felt gratitude letters from the recipients of our educational grants. This is a most successful program and we urge SRC residents and families to donate.

Thank you.
Dick DuBridg

“Through my charitable gifts to the Living Legacy Fund, I am confident the funds will be managed well, and used wisely to benefit our employees and their children.”

Your Gift Matters

The LLF was established in October 2006 for the stated purpose of enhancing the quality of life within, and affiliated with, Saratoga Retirement Community.

Every gift, regardless of amount, is appreciated and applied as the donor desires.

To be sure that all gifts received qualify for a tax deduction, LLF is affiliated with the Odd Fellows Home of California (OFHC), a non-profit organization operating under 501(c)(3) of the Internal Revenue tax code. LLF pays no administrative fees under this arrangement. Assets in LLF are held in an OFHC account managed by Merrill Lynch at the direction of the SRC LLF board.

The Living Legacy Board consists of SRC residents selected by the existing Board and approved by the Resident Council. LLF Board members are all SRC volunteers.

All assets contributed to the Living Legacy Fund are held in the Living Legacy General Fund or a designated fund from which grants are made to support the following programs: Education Grants Program and Residents' Assistance Program.

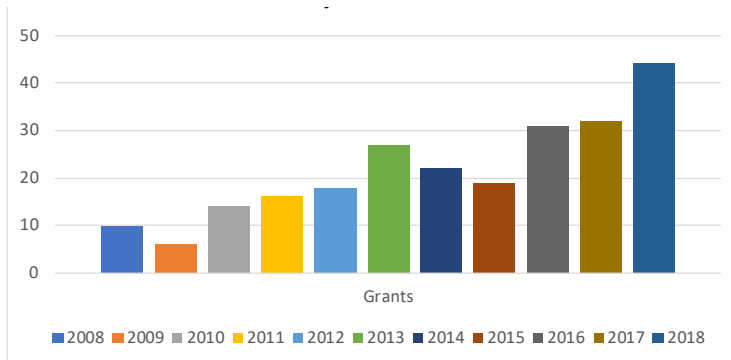


Role of the LLF Board

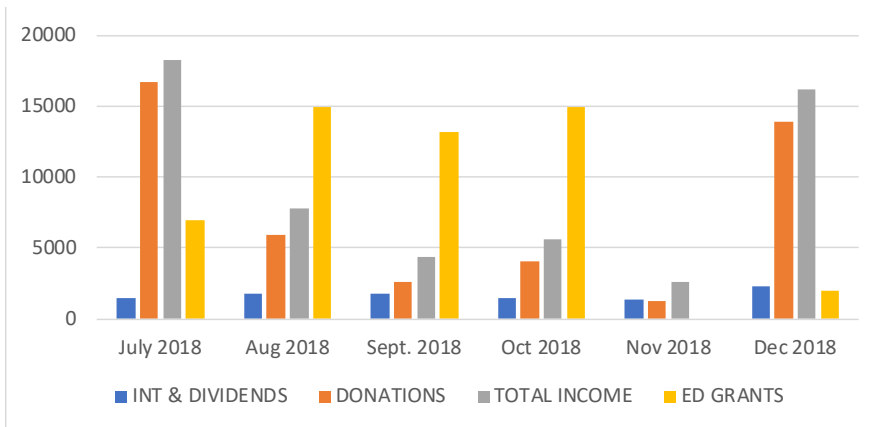
- Grow the Permanent Fund
- Solicit and manage the donations
- Manage the educational grant requests
- Keep the 501 (c) (3) status

SRC Living Legacy Fund Your Partner in Charitable Giving

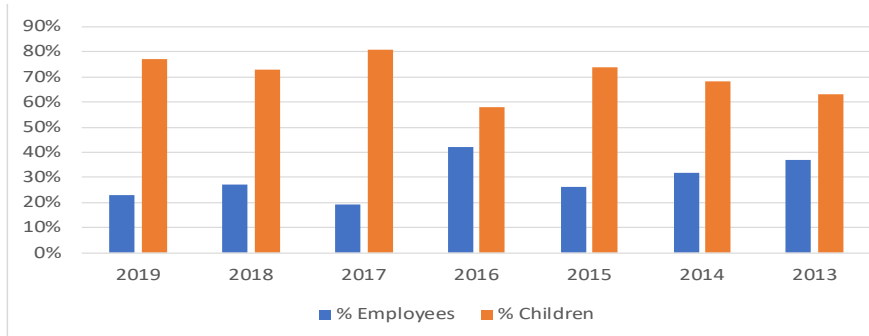
Education Grant Summary Grants by Year Since 2008



SRC LLF Monthly Financial Statement Q3 & Q4 2018



Education Grant Summary Employees vs Children of Employees



GRATITUDE-Circles of Caring

Our gifts to the SRC Living Legacy Fund support our employees and their families in their education, and other potential needs of our fellow SRC residents. We enjoy the gratitude and benefit derived from our recipients. Our Saratoga Retirement Community is enriched—and becomes sustainable.

LLF PLANNED GIFTS *Here's How*

- Name SRC LLF a beneficiary of your remaining assets in your will or living trust.
- Commit a percentage of assets remaining in your living trust after your lifetime.
- Name SRC LLF a beneficiary of a portion of your IRA or qualified retirement plan.
- Name SRC LLF as a beneficiary of a portion of a life insurance policy.

Board of Directors

Dick DuBridge, Chairman
 Steve Johnson, RC Liaison
 Tom Hogue, Treasurer
 Kathleen Roberts, Secretary
 Alan King,
 Educational Grants Chair
 Bev Lenihan,
 Fund Development Chair
 Ivan Fawley,
 OFHC Board Member
 Steve Clarke
 Linda Elden



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