



Living
Legacy
Foundation

HOPE — Circles of Caring

SRC Living Legacy Foundation 2019 - Annual Report


"I look for charities that align with my ethics and guiding principles. The Living Legacy Foundation aligns well, so I chose to make a significant gift."

Message from the Chairman

In January 2020 the SRC Living Legacy Foundation was confirmed as a tax-exempt charity under the IRS 501(c)(3) tax exempt umbrella. **Tax ID #84-3432820**. Its mission continues: "to generate resources with which to fund the enrichment of the quality of life within and affiliated with SRC." The focus areas for charitable giving are educational grants, resident assistance and the general fund.

In 2019 we awarded 49 Educational Grants for a total of \$110,518 to employees and their children to attend college throughout the United States, with majors from occupational skills to advanced academic degrees.

LLF continues to receive warm gratitude letters from the recipients of our educational grants. This is an investment in our well-being here at SRC and to our community at large. We urge residents to donate. Thank you.


RICHARD DuBRIDGE, Director

Your Gift Matters

1. The LLF was re-established as the SRC Living Legacy Foundation in January 2020 for the stated purpose of enhancing the quality of life within, and affiliated with, Saratoga Retirement Community.
2. Every gift, regardless of amount, is appreciated and applied as the donor desires.
3. All gifts received qualify for a tax deduction, a non-profit organization operating under 501(c)(3) of the Internal Revenue tax code. The SRC LLF Board members are all SRC resident volunteers.
4. Assets in LLF are held in an account managed by Merrill Lynch.
5. All assets contributed to the SRC Living Legacy Foundation 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.

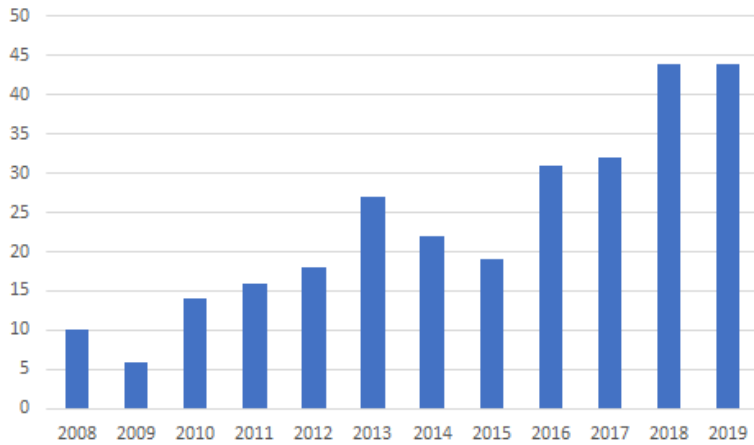


Role of the LLF Board

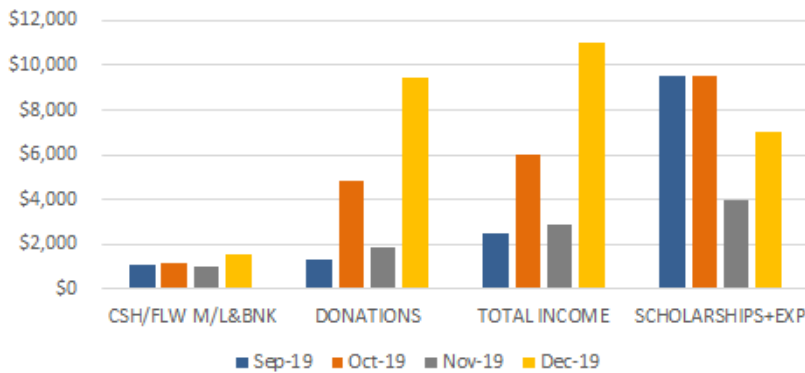
- Grow the Permanent Fund
- Manage the donations
- Manage the educational grant requests
- Keep the 501 c (3) status
- Honor the donor's wishes

SRC Living Legacy Foundation Your Partner in Charitable Giving

Education Grant Summary Grants
by Year Since 2008



SRC Monthly Financial Statement
Q3 & Q4 2019



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Our gifts to the SRC Living Legacy Foundation support our employees and their children in their education, and other potential needs of our fellow SRC residents. Joy is expressed by our recipients.

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 to LLF 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
Tom Hogue, Treasurer
Secretary - Open
Kathleen Roberts, Educational
Grants Chair
Bev Lenihan, Fund
Development Chair
& RC Liaison
Steve Johnson,
Communications Chair
Marilyn Basham, Events Chair
Linda Elden, Stewardship Chair



Saratoga Retirement Community Living
Legacy Foundation
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