

ANNUAL IMPACT REPORT

2020-2021

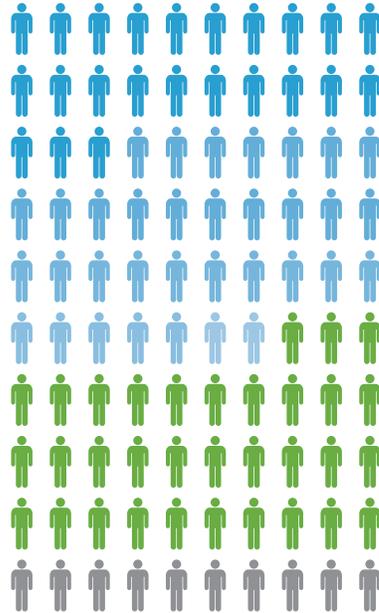
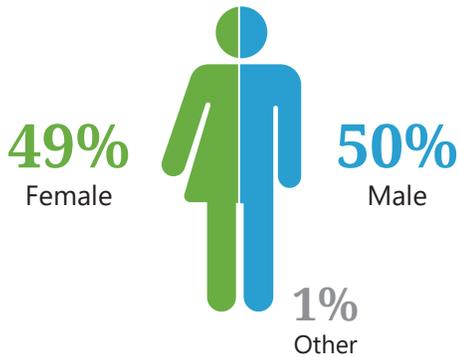


SERVING SENIORS

BY THE NUMBERS

UNDUPLICATED SENIORS SERVED

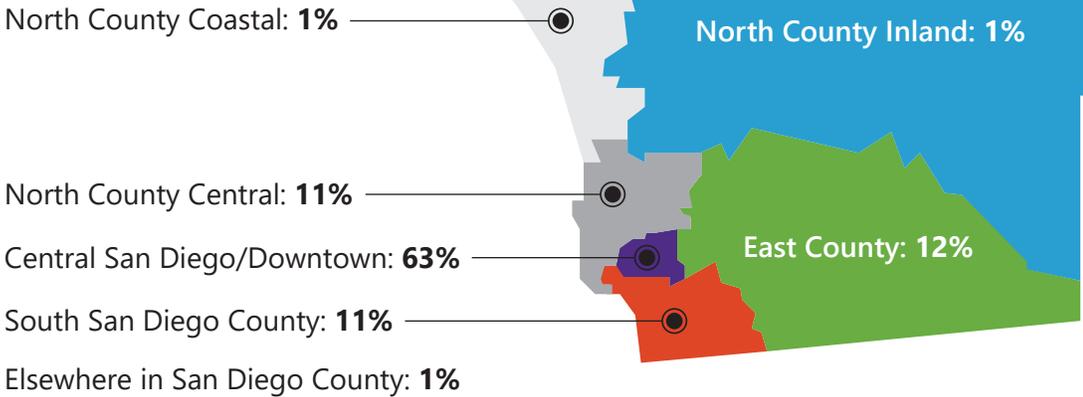
6,490



RACE/ETHNICITY

- 23% Hispanic/Latino
- 17% African American
- 10% Asian
- 5% Native Hawaiian/Pacific Islander
- 2% American Indian/Alaskan Native
- 33% White/Caucasian
- 10% Other

WHERE OUR CLIENTS LIVE



MILITARY VETERANS

11%

AGE



MEDIAN INCOME

\$1,081

84% Below the Federal Poverty Level

A MESSAGE TO OUR SUPPORTERS

Dear Friends,

More than 50 years ago, Serving Seniors served our first meal in the hopes of ending hunger for a small group of low-income seniors. Every day since then, we have remained steadfast in our mission to care for the poorest seniors in our community.

As we reflect back on the past 18 months, we cannot recall a more important time in our organization's history. Isolated and afraid, seniors needed us more than ever.

No one could have predicted the obstacles COVID-19 would bring, or the enormous response required to keep our seniors, staff, and community healthy. The pandemic tested Serving Seniors like never before as we faced daily challenges that seemed insurmountable. Yet, our dedicated Board, staff, and volunteers found ways to accomplish the impossible, day in and day out, for months on end. With their resourcefulness and an outpouring of community support, Serving Seniors has delivered nearly three million meals since the start of the pandemic—fulfilling our promise we made all those decades ago.

In the midst of a public health crisis, we stretched our capacity to safeguard our seniors' health and well-being. In the last fiscal year, Serving Seniors delivered a record number of meals (page 2); conducted a groundbreaking Senior Housing & Homelessness Needs Assessment (pages 8 and 9); and ensured low-income, homebound seniors gained access to life-saving vaccinations (page 6).

All of us at Serving Seniors know that none of this would have been possible without you, our generous donors. We are proud to present the following report highlighting this past year's achievements. Behind the numbers are the real lives of our seniors and their stories of transformation—a testament of your impact and unwavering support. Thank you for your partnership and keeping our seniors close to your hearts.

With gratitude,



Rob Borthwick
Chair, Board of Directors



Paul Downey
President & CEO

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NUTRITION

At Serving Seniors, we believe that there's no better medicine than a nutritious meal served with kindness and care. That's why after more than 50 years, our Nutrition Program remains the beating heart of our wraparound services—providing not only vital nutrients but a steady source of food to San Diego's poorest seniors. While the pandemic shut down our community, Serving Seniors stayed hard at work operating our Nutrition Program on an unprecedented scale. This past year, Serving Seniors delivered over 1.7 million meals and a lifeline of compassionate care that kept seniors healthy and independent.

FY21 HIGHLIGHTS

- Surpassed 14 million meals served.
- Increased the number of meals served by 78%.
- Helped 1,774 seniors through our shelf-stable meal program.

BY THE NUMBERS

Meals Served

1,706,359

Home-Delivered & To-Go: 1,016,238

Shelf-Stable: 690,121

Seniors Fed

5,681

Increased health and wellness for

73%

Made fewer visits to the doctor for

47%

Increased knowledge of nutrition and healthy eating habits for

69%

MEET LEON



Leon was an artist in downtown San Diego. One day he was found on the floor of his studio after suffering a stroke in his 60s. His medical crisis left him partially paralyzed on the right side of his body, and he now required a wheelchair.

His first contact with Serving Seniors was for a needed meal. During his visit, he learned how to get connected with housing and home-delivered meals. Ten days later, Leon moved into Serving Seniors' Potiker Senior Family Residence and was able to receive meals delivered to his new home.

He has been receiving home-delivered meals for 12 years and still practices as an artist from home.

"It [Serving Seniors] has been a source of world-stress relief," he said. "They take care of me."

HOUSING

Every senior deserves a place to call home. But with San Diego's skyrocketing rents and affordable housing shortages, many seniors struggle to find and keep a roof over their heads. That's why Serving Seniors ensures that San Diego's low-income seniors have access to safe, secure housing they can afford and sustain. Not only do we operate San Diego's only transitional housing program designed exclusively for homeless seniors, but we also maintain and develop permanent affordable housing with onsite services, including meals and social activities. Our housing services help seniors exit homelessness and provide stable homes where seniors can thrive.

FY21 HIGHLIGHTS

- Released a groundbreaking Needs Assessment study on senior homelessness (see pages 8 & 9).
- Increased the number of transitional units for homeless seniors by 36%.

BY THE NUMBERS

Affordable Units

412

Transitional Units for Homeless Seniors

30

Seniors Housed

520

Housing case management visits

6,363

Transitional housing graduates who were placed in permanent housing

85%

Increased housing security for

81%

MEET RICHARD



Before living out of motel rooms, Richard lived in the same apartment for 17 years and had a successful business selling at swap meets. After his business went downhill, he lost his apartment. "I was paying \$310 a week on motels, and my income was only \$952. I got behind on payments when my car broke down and could no longer run my business or afford

the motels." It was around this same time when Richard learned his close friend had passed away.

Grieving and at his lowest point, Richard felt the world was closing in around him. He soon had his hope restored when he was introduced to Serving Seniors. He entered our Transitional Housing Program and accessed support services for grief and trauma through Serving Seniors' UPAC Positive Solutions Program. "I learned a lot of grounding techniques in my sessions," Richard shared.

In January 2021, Richard found his forever home at our Potiker City Heights Residence with the help of our Transitional Housing Program staff. **"Through this program, I was also able to get housing and meals, which I'm very happy with. Thank you."**

HEALTH + SOCIAL SERVICES

Seniors living in poverty have difficulty accessing healthcare

and other resources they need to age with dignity. That's why Serving Seniors' experienced clinical team of registered nurses, social service case managers, and care navigators deliver health and social services that improve low-income seniors' health and well-being. While we knew delivering our services from a distance would be difficult, our staff dedicated themselves to the highest level of care by providing assessments, care coordination, wellness checks, and referrals to keep clients connected and safe.

FY21 HIGHLIGHTS

- Launched "Peace of Mind," a daily welfare check program at housing sites.
- Partnered with the University of San Diego by hosting a 27-week internship program for Master's Level Nursing students.

BY THE NUMBERS

Health and Social Service Visits

11,571

Seniors Served

1,362

Increased knowledge of chronic health conditions and how to prevent them for

92%

Increased health and wellness for

73%

Increase knowledge of health and community resources for

78%

MEET DIANE



At age 77, Diane has faced one of the most challenging years of her life. Diane has been living at Serving Seniors' Potiker Family Senior Residence for almost four years. She spent much of her time at our Senior Wellness Center socializing with friends and participating in the classes and activities onsite. That all changed because of COVID-19.

Since March 2020, human interaction and social connection have been nearly non-existent in her everyday life. Like thousands of low-income seniors in the San Diego community, Diane has been quarantined in her room and experienced the crippling effects of social isolation for the last eleven months.

"I felt like I was hit with a brick," Diane shared. "You get to the point of "Now what am I supposed to do?" and I just can't see myself being able to get through this."

Connecting with Serving Seniors has been a lifeline. Diane started receiving home-delivered meals and checked in with Serving Seniors Nurse Case Managers to stay on top of her medical needs. In fact, as a former nurse herself, Diane quickly formed a strong bond with Serving Seniors Nurse Case Manager Marilyn over weekly phone conversations and check-ins.

"Even though we're in this crisis, you're all still extending yourselves to help me. I'm very grateful for that."

ENRICHMENT + ACTIVITIES

Healthy aging means nourishing the whole person: mind, body, and spirit. That's why Serving Seniors offers engaging activities and enrichment opportunities that bring comfort and joy into seniors' lives. So when the pandemic forced seniors into isolation, we had to get creative in our approach to keeping seniors engaged and connected. From door decorating competitions to pet supply distributions, our Volunteer & Activities team brought fun and encouragement to seniors' homes and other safe spaces.



FY21 HIGHLIGHTS

- Serving Seniors' Connections Program provided meaningful conversation for seniors during lengthy lockdowns through weekly phone calls with volunteers.
- Hosted door decorating contests to celebrate the holidays and brighten the spirits of our housing residents.
- Held outdoor concerts and walking groups to promote wellness.

BY THE NUMBERS

Pet Food and Supply Distributions assisted

226 WITH **496**
Seniors Pets

Positive quality of life for

81%

Positive experience with the Connections Program for

95%

Reduced loneliness for

71%

MEET ROSEMARY



With her family far away in England, Rosemary experienced little face-to-face interaction for months at a time and had to rely on her six-year-old dog Kami for comfort and companionship. "I have no family near me," Rosemary said. "That's made this past year really hard."

Her dog Kami has been a source of hope during Rosemary's hardest times. Pet companionship provides comfort and a sense of purpose, which is especially beneficial for lonely and isolated seniors. But because Rosemary lives on a fixed income, supporting Kami can feel stressful sometimes.

Thankfully, Rosemary has received pet food and supplies every month through our Pet Food Distribution Program. Not only has Kami brought Rosemary an immense amount of joy, but she warms the hearts of many residents at Potiker Family Senior Residence.

"Kami is a therapy dog," Rosemary said. "She brings so much joy to so many residents."

COVID-19 RESPONSE

Life for all of us changed dramatically last year, but for older adults, the pandemic put them at high risk for serious illness and death. Alone and scared, many seniors spent the entire year sheltering at home. Serving Seniors was there every step of the way to make sure San Diego's low-income and homeless seniors had nutritious meals, vaccine access, a supportive friend to talk to, and a trusted place to turn for support.

Vaccination Clinics – Serving Seniors' worked with community partners at West Health, CalFire, and St. Paul's PACE to host vaccine clinics at our three housing residences and the Gary & Mary West Senior Wellness Center. With their help, Serving Seniors vaccinated over 200 of our community's most vulnerable seniors.



Shelf-Stable Meals – When the pandemic shut down congregate dining sites, we knew we had to respond. We quickly converted the Gary & Mary West Senior Wellness Center dining room into a food distribution center and packaged hundreds of thousands of shelf-stable meals delivered to more than 1,700 seniors.



Connections Program – Social isolation can be devastating to senior health and can lead to premature illness. That's why Serving Seniors created the Connections Program that paired volunteers with isolated seniors to chat about their day and develop friendships from home. The program was a resounding success, with 81% of program participants feeling more connected. Our volunteers were equally touched, *"I have learned so much and formed a powerful bond with my senior."*

MEET WEI



Since the COVID-19 pandemic started last year, Wei has rarely left his room at San Diego Square. But everything changed when Wei signed up for the Serving Seniors Connections Program. He was matched with a volunteer named Ben and found himself talking to him three times a week.

Over the next few months, Wei and Ben formed a deep connection, which soon turned into an undeniable friendship. Each week they talked about their everyday lives and what Ben is experiencing on the east coast while away at school.

"I really enjoy talking to Ben, Wei said. "He's my grandson's age, so I told him to call me "Grandpa Chen." We talk about everything and anything."

Wei shares with many people that the Connections Program is one of the good things that came out of the pandemic. "I feel like I've gained an American grandson through this program. We are very familiar with each other now and can talk about a lot of different things in life."

VOLUNTEERS



Volunteers are the bedrock of our mission, playing an essential role in the lives of our seniors. With so much of this past year spent quarantining for the greater good, volunteers showed up in new ways—creating handmade cards, boxing thousands of shelf-stable meals at our Senior Wellness Center, and organizing gift drives during the holidays. Our volunteers used their time and talents in a socially distanced world to make sure vulnerable seniors were not forgotten. These generous individuals went above and beyond to bring comfort and joy during a challenging year.

FY21 HIGHLIGHTS

- The Volunteer team conducted an internal audit of our Volunteer Program and built new infrastructure to better support our volunteers and seniors.
- Volunteers created traveling art exhibits to brighten the spirits of our housing residents.

BY THE NUMBERS

Senior and Community
Volunteer Hours

4,055

Value of Volunteer Time

\$136,289

Source: Independent Sector. 2020
Value of Volunteer hours in California
is \$33.61.

MEET MARTHA



One volunteer in particular, Martha, has done so much for seniors in the last year alone. In November 2020, she began volunteering as the Volunteer Administrative Coordinator at Serving Seniors, and before that she worked as a shelf-stable meal delivery driver.

"As a delivery driver, I loved connecting with the seniors," Martha said. "It's great to see the same seniors every week and get to know them on a first-name basis."

Being a fan of technology, Martha said she remembers helping a senior find his phone number, which allowed him to sign up for the shelf-stable meal program.

"I showed the senior how to find his number in his cell phone," Martha said. "It was as easy as adding himself as a contact, and he was so happy to know his phone number again."

Since becoming a volunteer, Martha has helped organize our volunteer database, reconnect past volunteers and write thank you cards. "It's great to know I'm contributing to Serving Seniors as a whole, Martha said. **"Everyone at Serving Seniors is very welcoming, and they've made a huge impact on my life."**

HOMELESSNESS + HOUSING INITIATIVE

SENIOR HOMELESSNESS NEEDS ASSESSMENT

According to San Diego's 2020 Point In Time Count, one out of four of San Diego's homeless adults is over the age of 55. Among this group, **88% became homeless in San Diego County**, and 43% are experiencing homelessness for the first time in their lives.

As an organization focused on assisting low-income and homeless older adults, we cannot allow these developments to go unaddressed. This past year, to uphold our commitment to San Diego's seniors, we partnered with Harder + Company Community Research to conduct a needs assessment focused on older adults at risk of or currently experiencing homelessness.



\$300
per month

may prevent half of the
older adults surveyed
from losing housing and
becoming homeless.

KEY FINDINGS

- Seniors are homeless due to the **lack of an economic safety net or a catastrophic event**.
- 56% need **\$300** or less of monthly income to increase their rent security.
- Seniors experiencing homelessness are avoiding shelters because of **safety concerns and facilities that are not age-friendly**.
- Less than 45% of service providers have **gerontological training, which influences effectiveness** when working with older adults.
- Homelessness assessment **tools not optimized** to prioritize older adults.
- **Challenges in identifying and accessing services** because of the Digital Divide and technology barriers.



A GOLDEN OPPORTUNITY TO REDUCE OLDER ADULT HOMELESSNESS IN SAN DIEGO COUNTY

While homelessness is an increasingly common issue for all age groups, our study found that older adults face specific and unique circumstances leading to homelessness, including economic stresses, age-related mental and physical health issues, and the Digital Divide. Serving Seniors sees a golden opportunity to address senior homelessness through these **age-friendly solutions** and services.

1. Expand Prevention Strategies

- Shallow Subsidy: Small, monthly financial supports to prevent housing loss.
- Reconnecting older adults with friends or family.
- Shared housing matchmaking.

2. Age-Friendly Shelters

- Reconfigure emergency shelters to be more age-friendly.
- Explore dedicated spaces for walkers and medical equipment, beds for frailty or mobility issues, and onsite recuperative or hospice care programs.
- Assess the feasibility of stand-alone “elder shelters.”



3. Improve Training for Service Providers

- Ensure all front-line personnel understand the circumstances and challenges older adults face.
- Equip staff with training and tools to improve service delivery.

4. Bridging Information Gaps

- Actively engage seniors during direct service touchpoints.
- Collaborate with agencies or information hubs to broaden access to aging services.

5. Advocacy for Policy and Funding Improvements

- Promote policies that identify and address older adults as a subgroup of the homeless population.
- Modify assessment tools and supports.

6. Invest in Affordable Housing for Older Adults

- San Diego County’s unsheltered and housing-insecure seniors need access to permanent, affordable housing to stop the high incidences of senior homelessness.

The Regional Taskforce on Homelessness created an Ad Hoc Committee on Older Adult Homelessness. Serving Seniors’ CEO Paul Downey has been appointed Chair.

To access the full report, please visit our website at www.servingseniors.org.

This initiative was made possible through generous funding from the **Hearst Foundations**.

FINANCIALS

Statement of Financial Position

July 1, 2020 - June 30, 2021

Assets

CURRENT ASSETS

Cash and cash equivalents	\$4,234,474
Investments	\$1,549,891
Other receivable	\$752,588
Grants receivable	\$2,167,884
Pledges receivable	\$79,971
Accounts receivable—related parties, net	\$84,126
Prepaid expenses and other	\$227,783

Total Current Assets **\$9,096,717**

NONCURRENT ASSETS

Pledges receivable, net	\$25,000
Notes receivable, net	\$11,499,734
Land, building and equipment, net	\$8,069,526
Investments in limited partnerships	\$501,519
Investments restricted for endowment	\$750,000
Beneficial interest in endowment funds	\$9,073

Total Noncurrent Assets **\$20,854,852**

Total assets **\$29,951,569**

Liabilities and Net Assets

CURRENT LIABILITIES

Accounts payable	\$249,729
Payroll and related liabilities	\$32,909
Accrued paid time off	\$257,359
Deferred revenue	—

Total Current Liabilities **\$539,997**

NONCURRENT LIABILITIES

Notes payable	\$2,200,000
Share of deficiency in limited partnerships	\$30,491

Total Noncurrent Liabilities **\$2,230,491**

Total liabilities **\$2,770,488**

NET ASSETS

Without donor restrictions	\$17,102,995
With donor restrictions	
<i>Purpose restrictions</i>	\$94,763
<i>Time restriction</i>	\$9,224,250
<i>Perpetual in nature</i>	\$759,073
Total with donor restriction	\$10,078,086

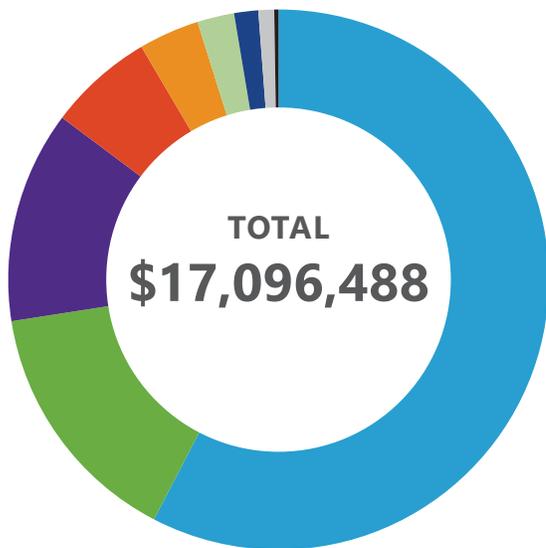
Total Net Assets **\$27,181,081**

Total liabilities and net assets **\$29,951,569**

Statement of Activities

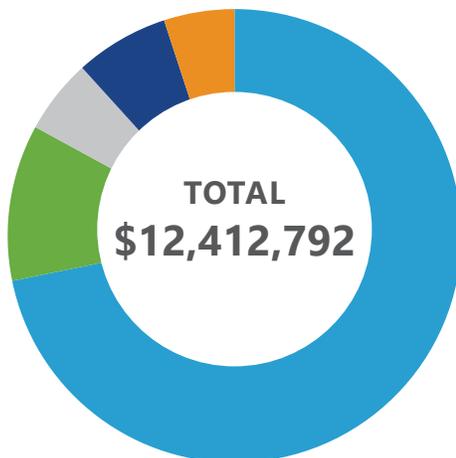
July 1, 2020 - June 30, 2021

REVENUE, SUPPORT AND GAINS



Government grants	\$9,850,680
Contributions	\$2,551,048
Other income	\$2,169,587
Housing	\$1,077,776
In-kind contributions	\$619,200
Investment income	\$377,533
Special events	\$250,845
<i>Special events revenue</i>	<i>\$250,845</i>
<i>Less: Cost of direct benefits to donors</i>	<i>(4,776)</i>
Special events revenue, net	\$246,069
Donations from seniors served	\$161,153
Rental income	\$43,442
Net assets released from restrictions	—
Total Revenue, Support and Gains	\$17,096,488

EXPENSES



Program Services	
Nutrition program	\$8,913,610
Health and social services	\$1,383,602
Housing development and facility support	\$661,112
Total Program Services	\$10,958,324
Supporting Services	
Management and general	\$830,165
Fundraising	\$624,303
Total Supporting Services	\$1,454,468
Total Expenses	\$12,412,792

Change in net assets	\$4,683,696
Net assets at beginning of year	\$22,497,385
Net assets at end of year	\$27,181,081

OUR SUPPORTERS

Thank you to the generous individuals, foundations, and corporations who made our work possible with their gifts of \$1,000 and above to Serving Seniors in the 2020–2021 (July 1, 2020 – June 30, 2021) fiscal year.

If you have any questions about your listing, please contact us at 619-487-0701 or kaia.hill@servingseiors.org

\$100,000+

Anonymous
The California Wellness Foundation
Hearst Foundations
The JMS Fund
May & Stanley Smith Charitable Trust
Gary and Mary West Foundation

Grossmont Healthcare District
Robert and Allison Price Charitable Trust
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Jewish Community Foundation San Diego
Julia Kelety
LS Power
Mary McKenzie

National Association of Nutrition & Aging Services Program (NANASP)
Arthur P. & Jeanette G. Pratt Memorial Fund
Sally and Steven Rogers
San Diego Seniors Community Foundation
Jim Sikora and Kelly Franz
Claudia and Simon Silva
Jill Sumner
Jennifer and Tim Sutton
Brenna and Morgan Wood

\$10,000 – \$24,999

\$50,000 – \$99,999

Community Congregational Development Corporation (CCDC)
Esther Fischer
Hervey Family Non-endowment Fund at The San Diego Foundation
Las Patronas
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Elaine Phillips
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\$1,000 – \$2,499

\$25,000 – \$49,999

Alliance Healthcare Foundation
Cheryl and Barney Daleiden
FHL Bank of San Francisco
Mary Gendron and Craig Perkins

\$5,000 – \$9,999

Dennis Arriola and Janet Winnick
Arthur & Barbara Bloom Foundation
Rob Borthwick
Jessica Colosimo and Case Iest
CSC TCI
Martha Guy
Mary Ellen and Jerry Harris
M. House Family Fund

\$2,500 – \$4,999

AT&T California
Lois and Rob Bernstein
California Bank & Trust
Joy Delman and Pete Elkin
Julie DeMeules
The Elizabeth Lowen Fund
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Carole Finch
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Linda and Ken Olson
Kathy Parker
Jamee Patterson
Reinhold Pfahler
Janace Pierce
Dawn Porter
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Annette Lau
Diana Rodi
Heather Rosing and
Scott Carr
Roy E. Crummer Foundation
Abby Sand (*Deceased)
Rosemary and Ron Santoni

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Martha and Richard Sloan
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Scott Strauss
Sunset Lodge #328
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Scott Walker
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Anne Walter
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Carol and Craig Whitwer
Rosa Williams
Lenora Witt
George Young

Your Legacy. Our Future.

When you join Serving Seniors' Legacy Circle by making a planned gift, you ensure that seniors will be cared for long into the future.

Serving Seniors would be happy to work with you and your professional advisor to help identify giving options that meet your charitable objectives.

For more information on including Serving Seniors in your estate planning, please contact Dave Ricks at (619) 487-0734 or dave.ricks@servingseiors.org.



SERVING SENIORS

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