

## Message from the President



ROSSMOOR  
FUND

*It is hard to express the gratitude of the Rossmoor Fund Board to you, our donors. Your generosity throughout the pandemic has been overwhelming. We very much hope to meet in person this year for our Donor Recognition Event, held every year for 10 years at the Event Center until the pandemic hit. We used Zoom and TV28 in 2021, but it just didn't feel the same.*

*These last two years, the residents that we serve through the Fund continued to have challenges.....from using Zoom to meet with doctors to figuring out how to get groceries delivered. Food insecurity and isolation were real consequences of the pandemic. Recipients tell us how meaningful our mailings of Safeway Gift Cards and CVS Gift Cards have been and how much receiving Meals on Wheels helps, along with the other needs we have been able to fund.*

*The Board has always taken it to heart to be good stewards of your generosity, and, we feel that responsibility even more so now.*

*With most people in Rossmoor vaccinated, and cases down significantly, we hope to see you in person once again to celebrate you, our amazing donors..... And what a celebration it will be!*

Claire LeVine Wolfe

## Rossmoor Fund Mission Statement

The mission of the Rossmoor Fund is to assist Rossmoor residents in need and to develop and fund educational and charitable programs for the Rossmoor community.

## Highlights from January to December 2021

- Awarded 69 grants, bringing the total number of grants since inception to 663.
- Underwrote programs with Contra Costa Legal Services.
- Continued and expanded the support of Meals on Wheels for Rossmoor residents for \$20,000.
- Underwrote a respite program in coordination with the Rossmoor Counseling Services and the Jewish Family and Community Services for caregivers.
- Continued to give Safeway Gift Cards to eligible residents totaling \$20,930.
- Continued a Home Repair Program in conjunction with Davis Home Pros.
- Underwrote a medical alert systems program for 30 residents.
- Continued the Legacy Society program.
- Honored donors and kicked off our 2022 campaign at a virtual reception.
- Received donations from 495 donors. Since inception, 7,654 contributions have been received.
- Received 34 donations as Tributes. Since inception, 155 people have been honored by 138 donors.
- Received generous support from clubs in Rossmoor and businesses.
- Continued a Spring Cleaning program for eligible residents.

## Board of Directors

Claire LeVine Wolfe, President

Louise Dibble

Wendy Dorband

Ellen Gilman

Lorraine Gousman

Alice Lau

Bill Leary

Donna Reynolds

Andrea Szentirmai

Gayl Westendorf

Al Zemsky

David Smith, Founder

## LEGACY SOCIETY

Sue DiMagio Adams, Anonymous,  
Jean Autrey, Sandra Maria Cavallo,  
Louise Dibble, Wendy & Bill Dorband,  
Linda Furlong, Ellen Gilman &  
James P. Comerford, Susanne Krasna,  
Alice Lau, Donna Reynolds,  
Nathan Roundy & Lynn Lively,  
Richard & Linda Scheffer,  
David & Sherry Smith, Reta Wilcox,  
Claire LeVine Wolfe

Rossmoor Fund  
Balance Sheet  
As of December 31, 2021

ASSETS	
Current Assets	
Cash - Checking	261,853.22
Total Current Assets	261,853.22
Other Assets	
Long Term Savings	466,603.08
Total Other Assets	466,603.08
<b>TOTAL ASSETS</b>	<b><u>728,456.30</u></b>
Liabilities & Equity	
Equity	
Retained Earnings	499,822.90
Net Income	<u>228,633.40</u>
Total equity	728,456.30
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b><u>728,456.30</u></b>

The Rossmoor Fund is a California non-profit public benefit corporation serving the charitable and educational needs of the Rossmoor Community. Your contribution, made payable to Rossmoor Fund, is tax-deductible as allowed by law. Contributions may be made by sending a check to the address below or by donating by credit card on our website.

Rossmoor Fund  
PO Box 2070  
Walnut Creek, CA 94595  
925-567 FUND (3863)  
www.rossmoorfund.org

Rossmoor Fund  
Profit & Loss Statement  
January through December 2021

Ordinary Income/Expense	
Income	
Investment Income	10,868.00
Contributions	<u>296,457.51</u>
Total Income	307,325.51   100.00%
Expense	
Awards and Grants	
Educational Grants	600.00
Individual Grants	75,019.69
Organizational Grants	26,171.55
Total Awards and Grants	101,791.24   33.12%
Fundraising Expense	
Donor Software	6,913.06
Credit Card Fees	1,198.18
Advertising	(1,297.75)
Printing, Postage	1,148.66
Recognition Events & Awards	1,581.57
Other	75.00
Total Fundraising Expense	9,618.72   3.13%
Overhead Expense	
Insurance	1,868.00
Website & Internet Expense	1,480.17
Office Expense	247.10
Other	268.91
Total Overhead Expense	<u>3,864.18</u> 1.26%
Total Expense	<u>115,274.14</u> 37.51%
Net Ordinary Income	192,051.37   62.49%
Other Income/Expense	
Unrealized Gain/Loss	36,582.03
Net Other Income	<u>36,582.03</u> 11.90%
<b>NET INCOME</b>	<b><u>228,633.40</u></b> 74.39%