

2025 Annual Report of the *Rossmoor Fund*

May 2026

Message from the President 2025

2025 was a very exciting and demanding year for the Rossmoor Fund as our Board of Directors continued existing programs and added many new programs to meet the everchanging demands of our community. Truly, we are Neighbors Helping Neighbors and the highlights below capture the scope of our reach.

Your support of the Rossmoor Fund is about real people who are in need in our community. The thank you notes we receive reflect the gratitude of your neighbors and are very touching. And yes, we receive handwritten notes of thanks from very grateful recipients!

Imagine dental bills of thousands of dollars? No way to get help taking care of your spouse with dementia 24x7? Inability to get to an Emergency Care Center due to the lack of weekend bus service? Scarce funds to get food with today's high prices? Need to write a Power of Attorney with limited understanding of the intricacies?

That's where your support of the Rossmoor Fund comes to the forefront! Every dollar contributed to the Rossmoor Fund stays in Rossmoor!

In this spirit, I am pleased to share with you the Annual Report of the Rossmoor Fund and thank you sincerely for your support,

Claire LeVine Wolfe, President.

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.

LEGACY SOCIETY



Sue DiMaggio Adams, Anonymous, Jean Autrey,
Sandra Maria Cavallo, Trish Daly, 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

Board of Directors

Claire LeVine Wolfe, President
Richard Davis
Wendy Dorband
Lorraine Gousman
Christine Kearney
Irene McKillop
Jennifer Mu
Donna Reynolds
Andrea Szentirmai
Elaine Thompson
David Smith, Founder

Highlights from January to December 2025

Awarded 63 grants to individuals, totaling over \$421,000, the majority of which were for medical needs: dentistry, hearing aids & vision related expenses; and awarded 40 organizational grants.

Provided grant recipients of the past 2 years with \$58,000 of Safeway gift cards, as well as supplying the Rossmoor Counseling Center with Safeway Gift Cards.

Supported 29 residents with Medic Alert Systems provided by Vitalink.

Supported a Respite Program, totaling \$40,000, in coordination with the Rossmoor Counseling Services and Jewish Family and Community Services.

Continued Home Repair Service provided by Davis Home Pros.

Continued a Spring Cleaning Service.

Underwrote programs with Contra Costa Senior Legal Services, including community-wide seminars and one-on-one sessions.

Supported educational Seminars put on by the Rossmoor Counseling Services.

Received donations from 490 individuals and businesses of \$264,661, including 18 tributes.

Provided emergency funding for SNAP recipients in Rossmoor during a shutdown of benefits.

Received monies from two trusts totaling over \$1.2M which solidifies the financial stability of the Fund for years to come.

Supported community programs with grants to the Rossmoor Library for large print books and Neighbors for Safe Streets for free Safety Vests.

Created and ran Easy Rider, a program that reimbursed residents for weekend transportation provided by Lyft and Uber, in lieu of no bus service provided by RWC(GRF).

Rossmoor Fund
Balance Sheet
As of December 31, 2025

ASSETS

Current Assets	
Bank Accounts	
Cash - Chase Bank Checking	\$ 48,791.77
Total Bank Accounts	48,791.77
Accounts Receivable	
Accounts Receivable	120.13
Total Accounts Receivable	120.13
Other Current Assets	
Gift Cards On Hand	17,200.00
Prepaid Expenses - Deposits	1,824.88
Undeposited Funds - Donations	22,078.20
Total Other Current Assets	41,103.08
Total Current Assets	90,014.98
Other Assets	
Schwab-Long Term Reserve Acct	2,049,388.21
Total Other Assets	2,049,388.21
TOTAL ASSETS	\$ 2,139,403.19

LIABILITIES AND EQUITY

Liabilities	
Current Liabilities	
Current Liabilities	0.00
Other Current Liabilities	
Accrued Expenses	5,252.38
Total Other Current Liabilities	5,252.38
Total Current Liabilities	5,252.38
Total Liabilities	5,252.38
Equity	
Retained Earnings	1,009,821.16
Net Revenue	1,124,329.65
Total Equity	2,134,150.81
TOTAL LIABILITIES AND EQUITY	\$ 2,139,403.19

THE ROSSMOOR FUND

is a California nonprofit 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 and Loss
January - December 2025

Revenue

Contributions	\$ 264,661.45
Interest Income - Banks	9.98
Mary L. Kelley Estate	233,354.03
Strand Revocable Trust	898,427.24
Total Revenue	1,396,452.70
Total Revenue	\$ 1,396,452.70

Expenditures

Awards and Grants	
Individual Grants	
Community Outreach	143.77
Gift Cards - Groceries	58,105.00
Home Repair/Maintenance	17,449.32
Medical	
Dental	93,507.50
Hearing	3,319.99
Medical - Doctors	3,998.00
Medical Alert Systems	11,281.92
Medical Equipment	5,995.00
Medicine	1,213.26
Vision	1,728.06
Total Medical	121,043.73
Other Expenses	6,918.10
Program Fact Sheets	245.82
Respite	
Support/Caregiving	40,000.00
SNAP Emergency Benefits	1,765.48
Total Individual Grants	\$ 245,671.22
Organization Grants	
Educational - Legal	
Services	630.00
Educational Programs	600.00
Food - Meals on Wheels	167,120.00
Neighbors for Safer Streets	6,346.20
Rossmoor Library	1,000.00
Total Organization Grants	175,696.20
Total Awards and Grants	\$ 421,367.42
Fundraising Expense	22,914.17
Overhead Expense	29,677.30
Total Expenditures	\$ 473,958.89
Net Operating Revenue	\$ 922,493.81
Other Revenue	
Investment Income	74,730.58
Unrealized Gains and Losses	127,105.26
Total Other Revenue	\$ 201,835.84
Net Revenue	\$ 1,124,329.65



Proof Policy

We greatly value your input and approval in finalizing your print job. Your approval serves as the ultimate green light for us to proceed with printing your project as it appears on the proof.

While our team takes meticulous care to ensure accuracy in every step of the prepress process, we recognize that occasional oversights can happen. We encourage you to review the proof thoroughly to guarantee the accuracy and quality of your project. Please note that viewing proofs on mobile devices, tablets, and e-readers or digital display devices is not recommended for color accuracy. Digital displays use RGB colors and can produce colors which differ from the printed piece. On digital devices, colors may appear more saturated or intense than they will appear in the final printed product, leading to inaccurate color representation.

In the rare event that a reprint is necessary due to oversights, rest assured that we will work closely with you to resolve the issue promptly and efficiently. However, please be mindful that any reprinting costs incurred will be discussed with you transparently and borne by you, as each print job involves significant resources such as ink, paper, labor, and other associated expenses.

We appreciate your understanding and collaboration in ensuring the success of your project. Thank you for choosing us as your printing partner, and we look forward to exceeding your expectations with the final product!