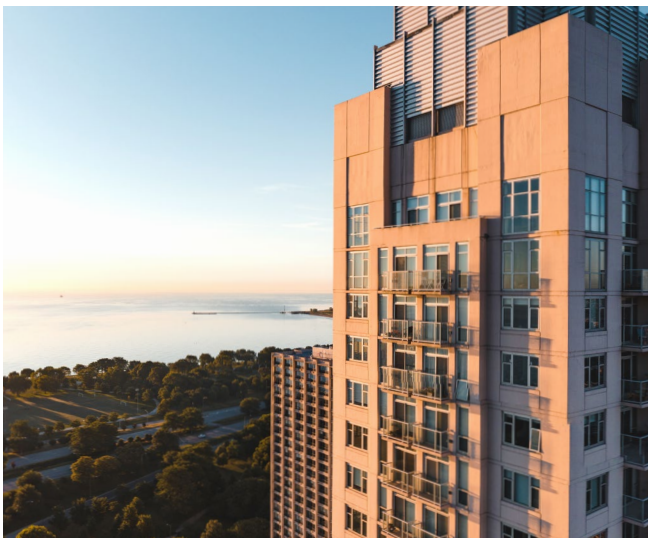




THE ADMIRAL AT THE LAKE
Foundation



2025
ANNUAL
REPORT



Our Mission

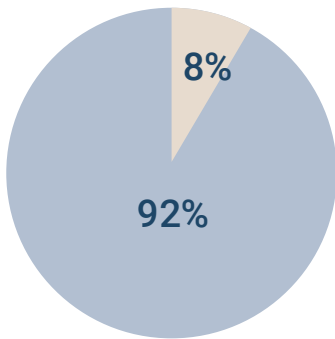
The Admiral at the Lake Foundation stewards charitable resources to support the long-term sustainability, security, and well-being of The Admiral at the Lake community.

Through philanthropy via outright, planned, and legacy gifts, the Foundation strengthens The Admiral at the Lake's ability to provide benevolent care to residents in need, invest in capital priorities, and build financial reserves that protect the community for generations to come. Philanthropy at The Admiral at the Lake is rooted in shared responsibility, care for one another, and a commitment to ensuring that residents can continue to call The Admiral at the Lake home, even in times of uncertainty.

Benevolent Care: Stability When It Matters Most

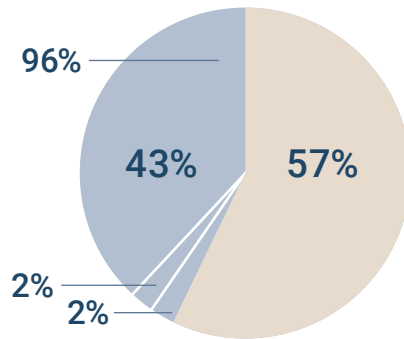
When unexpected medical expenses placed a strain on a resident's resources, Benevolent Care made it possible to remain in their home without disruption, displacement or fear. Benevolent care does more than provide financial assistance. It preserves continuity, dignity and belonging. It is these core values that led residents to name Benevolent Care as the number one reason for the Foundation to raise Funds.

2025 Impact At A Glance



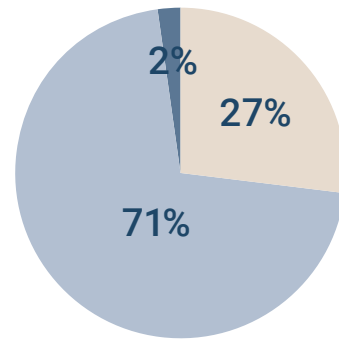
USE OF FUNDS OR EXPENDITURES

- **Administrative Costs**
Total: \$9,122
- **Benevolent Care**
Total: \$98,993



TOTAL INCOME \$688,967

- **Unrestricted**
\$389,710
- **Restricted**
\$299,257



RESIDENT-DRIVEN DONATIONS

Through their volunteer committees, The Admiral residents raised a total of \$295,094 in 2025 through three successful campaigns:

- **Admiral Residents Association**
Total: \$79,742
- **Employee Appreciation**
Total: \$210,102
- **Employee Education**
Total: \$5,250

These funds are managed and distributed entirely by residents and are central to our mission and the quality of life for our community.

Total Foundation Assets of \$16.7 Million

- Trust Accounts - \$10,126,586
- Liquidity Support - \$5,772,365
- Cash - \$790,594

Ways to Give

There are many meaningful ways to support The Admiral at the Lake Foundation:

Outright Gifts: check, credit card, monthly giving via www.theadmiral.org

Gifts of Stock or Securities: a tax-efficient way to support the Foundation's mission

Planned Gifts: include bequests, trusts, retirement accounts, life insurance, or entrance fee refund designations

Any gifts may be made in memory or honor of a loved one, or designated to areas of care or programs that are meaningful to the donor.

The Foundation is grateful to our residents, volunteers, staff, and donors for ensuring the continued excellence of The Admiral at the Lake.

This Year's Highlights Included Gifts to The Admiral at the Lake Totaling More Than \$1 Million

- Medical Director Dr. Eric Mizuno chose to donate \$460,000 of his fee, as a **Gift in Kind**, back to The Admiral in support of staff well-being, professional development, and recognition. His generosity reflects a deep commitment to the people who care for our residents and to the long-term health of the community. *"It is my great honor and privilege to be allowed to serve the extraordinary residents in this truly special community."*



Dr. Eric Mizuno

- The Admiral received a generous **Estate Gift** from former employee Clarence Malmin, a devoted Facilities team member who took great pride in caring for The Admiral grounds, including the bird bath and feeders that gave him particular joy. Clarence's gift, designated as "area of greatest need" reflects his deep love for The Admiral and reminds us of his quiet dedication.



Clarence Malmin

- Marion H. Weber, a longtime neighbor of The Admiral, established a **Remainder Trust** to ensure the lifelong care of a child with disabilities and named The Admiral at the Lake as the recipient of the remaining balance. Her unrestricted gift reflects compassion and foresight. We are deeply grateful to Marion and the entire Weber family.



Marion H. Weber

- One hundred and three residents participated in **listening sessions** conducted by Foundation Board members. Residents shared their hopes, concerns and priorities for the future of The Admiral and led the Foundation Board to establish two fundraising priorities – Benevolent Care and Capital Improvements.

- A longtime resident, Jan Petry, left a **Legacy Gift** to the Foundation in her will to support Benevolent Care. This followed years of Jan's and her partner's gift of fresh flowers for The Admiral lobby each week. Jan's history of generosity led the residents to establish a perpetual **Lobby Flower Fund** in her memory.



Jan Petry

- Board member Shawn McCullough, an estate planning attorney and CPA, volunteered his time and expertise to offer two educational sessions for The Admiral at the Lake community on "Ways to Give," helping residents better understand charitable planning options and empowering informed, thoughtful philanthropy.



Shawn McCullough

- **Board members donated a total of \$35,000** to support the Foundation's mission.

Legacy Giving: Impact That Endures

Legacy gifts are among the most powerful expressions of belief in The Admiral at the Lake's mission. These commitments reflect foresight, trust, and a desire to care for future residents as thoughtfully as today's.

Collectively, Legacy Society members have made more than **\$2 million in known charitable commitments** through estate plans, trusts, and entrance fee refund designations. Additional future gifts are anticipated through estate provisions not yet valued.

We are deeply grateful to the Legacy Society members listed below, whose foresight and generosity reflect a lasting commitment to The Admiral at the Lake community and to future generations who call it home.

Italics indicate a deceased member.

Joan Bransfield

Nancy Kloetzli

Norm and

Janet Reed

Toni Smith

Melody Hansen

Angie Mills

Helene Raidl

Helen Shidler

Carol Stitzer and

Bill Hinchliff

Jane Purdy

Anna Rappaport

Sarah Shirk

Marshall Marcus

What's Ahead

As the Foundation looks forward, we will focus on building fundraising momentum and deepening impact. Priorities include:

- Hiring a full-time development professional
- Expanding our donor base and enhancing donor engagement
- Growing legacy giving and memorial gifts
- Designing an annual fundraising campaign that supports operations, benevolent care, and capital reserves
- Preparing for a major capital campaign to fund improvements and upgrades to facilities

Philanthropy at The Admiral at the Lake is not supplemental, it is a strategic partner in mission, stability, and care.

To learn more or begin a conversation: The Admiral at the Lake Foundation

Nadia N. Geigler, CEO | ngeigler@theadmiral.org

The Admiral at the Lake Foundation is a 509(a)(3) Type I supporting organization that supports the activities of The Admiral at the Lake, a 501(c)(3) tax-exempt charitable organization. Contributions to The Admiral at the Lake Foundation are deductible as charitable donations to the extent allowable by law. No goods or services of any value were or will be transferred or provided by The Admiral at the Lake Foundation EIN: 20-4057288 to the donor in return for this donation.

