



Annual Report



THE UNITED METHODIST
RETIREMENT HOMES, INC.



2025

UMRH.ORG

Our 2025 Front Cover Features:

Top Image: Wesley Pines assisted and independent living residents enjoy an interactive Christmas Concert with opera composer, Mary Carol Warwick. **Second Image:** Janice Wynne proudly displays a piece of art she completed during an activity with Life Enrichment. **Third Image:** Anne Fogg and Barbara Pray. Croasdaile offers fun learning sessions with hands-on activities. **Fourth Image:** Elaine Johnston and Shirley Sneed. The bond between our residents and staff is strong here at Croasdaile. **Small Image:** Linda Karolak. Smiling faces in happy places at Croasdaile. **Bottom Image:** Dancers enjoying the beach music at Wesley Pines' Shaggin' Under the Pines.

The Mission

of The United Methodist Retirement Homes, Inc., a faith-based, non-profit, life plan organization, is to provide a lifestyle of wellness and overall enrichment, with access to long-term care for a diverse population of senior adults.



Executive Directors

Pictured above, left to right:
Heather March, Croasdaile Village;
Amy Hilburn, Wesley Pines; Laurie
Stallings, Cypress Glen; Jonathan
Erickson, UMRH Corporate.

Editors & Contributors

Jonathan Erickson, Caleb Baker, Stacy
Dobson, Angie Pegram, Heather
March, Rebecca Marion-Grady, Laurie
Stallings, Elizabeth Jenkins, Amy
Hilburn, Jim Haskins, Craig Lloyd

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It is our pleasure to introduce to you the 2025 Annual Report.

We are thankful for the leadership and dedication of our executive directors, associate executive directors, administrators, their department directors and teams, our corporate office personnel, and all employees working tirelessly in providing services and care to our residents. Throughout the year, we remained focused on the safety, health and wellbeing of our residents and staff. We also appreciate the great resources of LCS, our management partner. LCS continued to provide educational updates, best practices, policies, support and guidance. We congratulate LCS on receiving the J.D. Power award for Highest in Customer Satisfaction among Independent Senior Living Communities for the seventh year in a row. We are blessed with a wonderful group of volunteers on our UMRH and UMRH Foundation boards and local committees who dedicate their time, passion, leadership, experience, and skills to continue the Mission of UMRH to thrive, grow and serve our residents and employees.

Our resident volunteers continued to stay engaged and are essential to the overall resident experience and satisfaction. Many of our residents serve on committees such as Spiritual Life, Building and Grounds, Life Enrichment and Wellness, to name a few.

As we are interconnected to the local communities where we reside, we feel that we should “give back” and are called to serve to our communities. Many residents volunteer at neighboring schools, hospitals, libraries and other organizations within the community along with providing financial support to local and national organizations.

As you will see in this report, there have been many successes from working to provide services in new and different ways, maintaining resident-centered enrichment programs. Croasdaile Village, Cypress Glen and Wesely Pines continue their expansion and renovation projects, master planning and high standards for resident care. We maintained our Fitch BBB status, demonstrating our commitment to continued financial stability and strength.

We are very thankful for the personal and financial contributions of the many residents, family members, corporations, the North Carolina Conference and others. These contributions play a significant role in our ability to provide benevolent care and improve resident life.

W. Lee Harriss

UMRH Board of Trustees Chairman

Jonathan Erickson

UMRH Corporate Executive Director

UMRH and Foundation Board of Trustees & Directors

Top Row – Left to Right: Lee Harriss, Board Chairman; Susan Ezekiel, Board Vice Chairman; Mack Parker, Board Treasurer; Nancy Van Antwerp, Board Secretary.

Second Row – Left to Right: Carl Hardy; Rev. Paul Lee; James Martin; Charles Mercer.

Third Row – Left to Right: Rev. Gray Southern; Dr. Kenneth Steinweg; Dr. Ruth Little; Sheryl Taylor.

Bottom Row – Left to Right: Steve Harper, Croasdaile Village Residents’ Association President; Bob Clinkscales, Cypress Glen Residents’ Association President; Jim Mullen, Cypress Glen Local Committee President; Wilson Ray, Wesley Pines Residents’ Association President.



UMRH and Community Leadership

Top Row – Left to Right: Jonathan Erickson, UMRH Corporate Executive Director; Stacy Dobson, UMRH Chief Financial Officer; Caleb Baker, UMRH Director of Development.

Middle Row – Left to Right: Heather March, Croasdaile Village Executive Director; Rebecca Marion-Grady, Croasdaile Village Associate Executive Director; Sanya Alam, Croasdaile Village Healthcare Administrator.

Bottom Row – Left to Right: Amy Hilburn, Wesley Pines Executive Director; Laurie Stallings, Cypress Glen Executive Director; Trey Hayes, Cypress Glen Healthcare Administrator.

Year-End Financials



Stacy Dobson
UMRH Chief
Financial Officer

“UMRH remains financially strong and is positioned well to support growth.”

Ms. Sara Watson of FORVIS/ Mazars, presented the audit report for UMRH for the fiscal year, ending September 30, 2025, to the UMRH Board of Trustees. She reported a clean audit with no adjusting entries and no material weaknesses. A copy of the completed audit is on file and available for viewing upon request.

Sources of Cash

Net Operating Income (NOI), Attrition Income, Investment Income, Borrowed Funds, Donations.

Uses of Cash

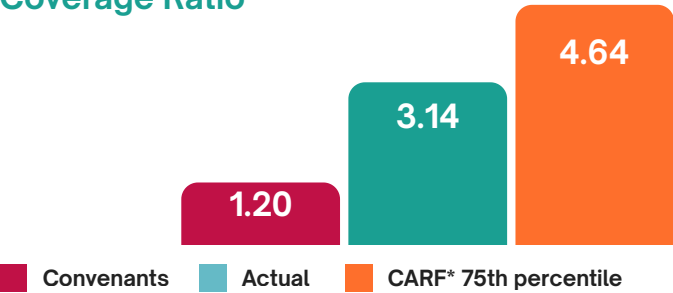
Debt Service, Community Enhancements, Increasing Reserves, Benevolences, Capital Improvements.

Covenants

“Covenants” are agreements UMRH has with its lenders. The covenants require UMRH to have a minimum of 250 days cash on hand, a 1.2 times debt service ratio coverage, and a 35% cash to debt ratio. The chart provided shows that all of these requirements are met.

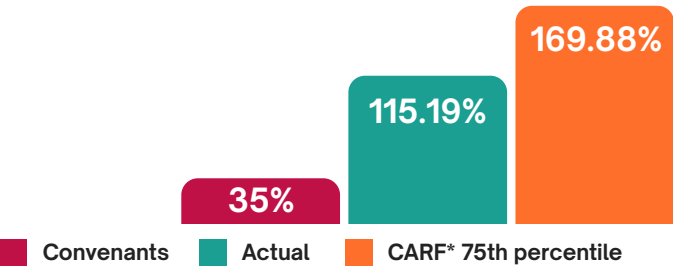
2025 Financial Achievements

UMRH, Inc. Debt Service Coverage Ratio



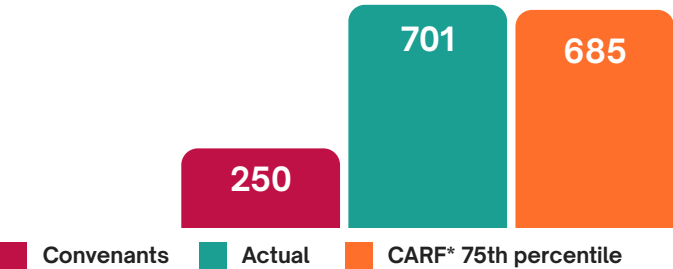
This is a “Capital Structure” ratio focusing on the balance sheet and providing insight into long-term solvency. This ratio reflects the organization’s ability to fund annual debt service with cash reserves and net entrance fees.

UMRH, Inc. Cash to Debt Ratio



This is a “Capital Structure” ratio focusing on the balance sheet and providing insight into the long-term solvency. This ratio measures the organization’s position with available cash and securities to its long-term debt.

UMRH, Inc. Days of Cash on Hand



This is a “Liquidity” ratio focusing on cash and investments and providing insight into meeting short-term (one year) cash needs of ongoing operations. The ratio measures the number of days of operating expense covered by cash and cash equivalents.

* Commission on Accreditation of Rehabilitation Facilities

The United Methodist Retirement Homes, Inc., Its Affiliate and Subsidiary

Consolidated Balance Sheet September 30, 2025

ASSETS

Current Assets

Cash and cash equivalents	\$ 3,219,037
Investments	129,519,440
Assets limited as to use, current portion	9,380,571
Accounts receivable, net	3,983,161
Other receivables	2,255,285
Inventories	247,784
Prepaid expenses and other current assets	1,500,382
Total Current Assets	\$ 150,105,660

Non-Current Assets

Assets limited as to use, net of current portion	\$ 51,351,701
Investments - restricted	12,324,999
Property and equipment, net	271,839,544
Trusts receivable	166,340
Deferred marketing costs, net	153,977
Interest rate swap agreements	7,311,064
Total Non-Current Assets	343,147,625
Total Assets	\$ 493,253,285

LIABILITIES AND NET ASSETS

Current Liabilities

Annuity payable, current portion	\$ 39,649
Bonds payable, current portion	18,995,000
Accounts payable	11,985,801
Accrued salaries and related expenses	2,781,884
Accrued interest payable	3,382,251
Total Current Liabilities	\$ 37,184,585

Long-Term Liabilities

Annuity payable, net of current portion	\$ 211,685
Bonds payable, net of current portion	196,851,322
Liability for refundable advance fees	14,548,871
Deferred revenue from non-refundable advance fees	97,027,622
Due to related parties	8,696
Funds held for others	56,942
Total Long-Term Liabilities	308,705,138
Total Liabilities	\$ 345,889,723

Net Assets

Without donor restrictions	\$ 128,866,690
With donor restrictions	18,496,872
Total Net Assets	147,363,562
Total Liabilities and Net Assets	\$ 493,253,285

Consolidated Statement of Operations and Changes in Net Assets. For the Year Ended September 30, 2025

REVENUES, GAINS, & OTHER SUPPORT WITHOUT DONOR RESTRICTIONS

Net resident and patient service revenue	\$ 87,057,307
Amortization of advance fees	12,392,998
Net assets released from restrictions	642,522
Other	269,153
Interest and dividend income	5,534,621
Total Revenues, Gains and Other Support	\$ 105,896,601

EXPENSES

Nursing services	\$ 24,308,088
Dietary and food services	15,690,521
Administration	14,829,332
Plant operations, maintenance and security	9,409,353
Laundry and housekeeping	4,978,501
Resident services - activities	3,164,009
Home care	3,479,284
Interest	4,981,972
Depreciation and amortization	15,358,667
Loss on disposal of property and equipment	146,278
Total Expenses	96,346,005
Operating Income	\$ 9,550,596

NON-OPERATING GAINS (LOSSES)

Net investment gains, realized	\$ 5,286,532
Net investment losses, unrealized	(1,145,638)
Contributions	36,746
Construction related marketing costs	(76,410)
Change in fair value of interest rate swap agreement	359,178
Other	(25,404)
Net Non-Operating Gains	4,435,004

Excess of Revenues, Gains and Other Support Over Expenses	13,985,600
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Net assets released from restrictions for purchase of property and equipment	98,344
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Change in Net Assets Without Donor Restrictions	\$ 14,083,944
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CHANGE IN NET ASSETS WITH DONOR RESTRICTIONS

Contributions	\$ 912,879
Interest and dividend income	393,920
Net investment gains, realized	621,775
Net investment gains, unrealized	165,518
Change in split interest agreements	285,011
Net assets released from restriction	(740,866)

Change in Net Assets With Donor Restrictions	1,638,237
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Change in Net Assets	15,722,181
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Net Assets, Beginning of Year	131,641,381
Net Assets, End of Year	\$ 147,363,562

Croasdaile Village

DURHAM, NC

Heather March, Executive Director

Croasdaile Village proudly reflects on a year of growth, innovation, and strong commitment to serving our 770-resident community. Fiscal Year 2025 brought notable achievements across all areas of our community—from advancing wellness programs and enhancing safety measures to expanding services in response to our resident satisfaction survey.

Marketing

Marketing sustained strong performance, achieving occupancy of 96.22% and sold status of 98.22% despite attrition and transfers. The Marketing Team continues to focus on lead-nurturing with future residents on our waitlist, which enables us to back-fill availability with reservation deposits as soon as apartments/cottages are vacated.

Our Phase IV Expansion to add additional Independent Living units was a major success, with all 58 units being presold in just 87 days! Four cancellations were quickly resold, demonstrating robust demand. Planning is underway for a groundbreaking event to celebrate this milestone.



Wellness Department

The Wellness team focused on evidence-based intervention programming to improve residents' quality of life. Recognizing the growing need for programs highlighting Parkinson's disease, the department earned their Parkinson's Wellness Recovery certification allowing our team to offer more classes geared to this need! Additionally, the 12-week Diabetes Management Course empowered participants to manage their condition through nutrition, exercise, and stress reduction, with documented improvements in A1C and cholesterol levels. The 8-week Balance and Fall Prevention program achieved a 100% success rate among completers, with measurable gains in stability and function confirmed through pre- and post-assessments. These initiatives bring to light our commitment to proactive, personalized wellness strategies.

Community Benefit: \$27,880

This figure represents the services provided to the greater community by Croasdaile Village.

Benevolence Provided: \$4,077,220

Croasdaile Village provides benevolent assistance to residents who, through no fault of their own, can no longer meet their financial obligations.



Photo top right: Our Croasdaile Ambassadors, Don and Susan Blanchard, welcome new residents to our community at a thank you dinner to show our appreciation. *Photo bottom left:* (clockwise left to right) Croasdaile Village Residents, Will Heflin, Carol Ashley, Lee King, and Barbara Walls, enjoy a challenging game of ping pong.

Professional Development

Our professional development initiatives were created with employee retention and growth in mind. The creation of the Supervisory Training Program allowed 8- team members to increase their skill set for promotion in their field. The Medication Aide Program provided structured pathways for leadership and clinical growth for our Certified Nursing Assistants. The annual Skills Fair provided a space of confidence and renewed education for clinical skills, emergency response, infection control, and resident-centered care. Deon Simpson, our Director of Professional Development, diligently utilized our vendor contracts for assistance in development of our education programs this year.



First photo top right: Croasdaile Village Resident, Nell Hubbard and Staff Member, Gracie Ellington share a smile to brighten the day. **Second photo top right:** Croasdaile Village Resident, Linda Dawson, showcases our "Bee Downtown" bee hives now on campus. **Photo bottom left:** Croasdaile Village Resident, Elaine McKelly, participates in a Life Enrichment offsite activity and proudly displays her take home project.

Communications

Resident communications was a focus this year in response to our resident satisfaction survey. Over the last year, we have worked with our resident communication platform, TouchTown, to improve resident communication by having a central site for reference. Croasdaile's platform was recognized nationally as a model site within the Uniguest portfolio, and expanded features now include text messaging, Alexa integration, and digital bulletin boards.

We also began a Croasdaile Village podcast series that allows us to feature and capture our resident life stories to share with the community. Additional initiatives included updating the Resident Handbook, revamping orientation programs, and introducing on-demand Apple TV programming for events.

Navigation & Home Care

Navigation achieved its first-ever GOLD status in the LCS Signature Health & Wellness Navigation program! This represents the highest level of excellence in care coordination for our residents. The department continued its core mission of responding to health events such as falls, hospital transitions, and overall care needs for Independent Living residents. Beyond reactive care, Navigation led impactful educational initiatives, including the Death by Design series on end-of-life planning and Croasdaile's inaugural Safety Fair, which featured emergency preparedness resources and live updates to residents' emergency contact information.

Home Care experienced significant growth over the year under the leadership of Sarah Straniero who joined our team in September 2025. The department adopted a "yes" mindset to accommodate resident needs, from medication reminders to 24-hour care, achieving 99% referral acceptance. To meet rising demand, Home Care streamlined hiring through open scheduling and "on-the-spot" job offers, surpassing its annual hiring goal with 101 CNAs onboarded five weeks ahead of schedule. We are happy to have this level of care to offer in the community, giving our residents flexibility and options as they age.



First photo top right: Croasdaile Village Residents, Jack Pucack and Bruna Piccin, celebrate Valentines Day. Second photo top right: Croasdaile Village Resident, Kathy Yang, participates in the July 4th parade in the Orchard. Photo bottom left: Croasdaile Village Residents, Jane Cross, Jim Bramlett, Jim and Barbara Hastings, enjoy our monthly paired dining events.



Dining Services

The Dining Department achieved major milestones in 2025, highlighted by the construction of The Village Market, to open in early January 2026. This new venue will significantly reduce the operational load on Barnes Café, which currently manages nearly 490 meals daily, and will enhance service efficiency and menu offerings. The year also marked the first time Croasdaile operated with a full culinary leadership team, enabling improvements such as Village Bistro dinner service, quarterly cycle menus, and the launch of the Resident Supper Club to foster social connections. Compliance remained strong with all dining permits scoring 99 or higher, and staffing stability improved through focused recruitment. Resident experience was enhanced with technological upgrades for online order confirmations and streamlined production processes. Workforce development advanced through an eight-week Hospitality Front-of-House training program, with plans to expand training to Back-of-House and Health Care dining teams in 2026. Health Care dining achieved deficiency-free surveys, introduced a bedtime snack program, and hosted monthly Chef's Tables and resident-driven events like Meal in the Life, promoting engagement and wellness. Overall, 2025 positioned Dining Services for continued innovation and elevated service delivery.



New Leadership Roles

This year marked several significant leadership changes on our team. Janay Burwell is mentioned above; however, we had a few more. Susan Mullis, RN, MSN is our new Clinic Director as Mary McCaffrey-Murphy retired after nearly 30 years of service. After the retirement of James Sanes, the organization conducted a seven-month search for a new Director of Maintenance. In September, Rick Winslow joined the team, bringing extensive experience as a Facilities Director in the Continuing Care Retirement Community (CCRC) environment. John Barrett joined our team as the new Environmental Services Director after the retirement of Patty Gentry.

Life Enrichment

Life Enrichment experienced significant growth and creativity under new leadership, with Janay Burwell assuming the role of Department Head in February. The team expanded the calendar to include diverse programs such as musical performances, shopping trips, twice-monthly Supper Club and Lunch Bunch, karaoke, travelogues, arts and crafts, and outings to local favorites like Southern Supreme and The Peach Cobbler. Popular events included Summer Ice Cream Socials, Sing-Alongs, Quarterly Bingo Nights, Slushies Bar, and celebrations of national days such as National Donut Day, along with seasonal highlights like the NC Chinese Lantern Festival and Apex Holiday Lights. A new program geared toward male residents, Top Golf, was introduced, with more activities planned for next year.

With plans already underway for 2026, Life Enrichment remains committed to fostering inclusivity, creativity, and meaningful connections through innovative programs and events.

Photo top left: Croasdaile Village Residents, Ruth Fleming and Morita Rapoza participate in the Life Enrichment project, Living Artwork. First photo bottom right: Croasdaile Village Residents, Lindsay Lambe, Ginny Knight, and Carole Molder, participate in the annual Turkey Trot. Second photo bottom right: Croasdaile Village Residents, Bob Wienberry and Jack Dailey; Friendships grow here at Croasdaile Village.



Cypress Glen

GREENVILLE, NC
Laurie Stallings, Executive Director

Marketing, Operations, and Community Impact

A Year of Momentum, Excellence, and Service

The past year at Cypress Glen was defined by progress, engagement, and a continued commitment to excellence across the community. From strong sales performance and meaningful resident connections to operational achievements and community outreach, Cypress Glen advanced its mission while preparing for an exciting new chapter of growth.



Marketing & Sales: Building for the Future

Cypress Glen's Marketing and Sales team successfully balanced high occupancy and sales goals while laying the groundwork for the community's next phase of expansion. Throughout the year, the team welcomed new residents, supported smooth transitions into their Cypress Glen homes, and expanded the future resident waitlist. At the same time, they nurtured relationships with individuals and families planning to move into the new Independent Living South Wing. Cypress Glen is preparing to welcome nearly 100 new South Wing residents into 57 apartments during the first quarter of 2026, with the first move-ins scheduled for January.



*First photo top right: Dr. Earl Trevathon, supervising the "Topping Out" of the Brown Chapel & Auditorium **Second photo top right: Phyllis and Frankie Bradshaw** inspecting their new apartment in the South Wing. **Photo bottom left:** Left to Right: Eric Bendixon, Elizabeth Jenkins, Laurie Stallings, John Stephens, Jeff Louk, Jonathan Erickson, Mark Dunnagan.*

Community Benefit: \$687,854

This figure represents the services provided to the greater community by Cypress Glen.

Benevolence Provided: \$622,716

Cypress Glen provides benevolent assistance to residents who, through no fault of their own, can no longer meet their financial obligations.

Future South Wing residents remained closely connected through regular email updates, monthly “Hard Hat” construction presentations, social gatherings designed to foster early connections among future neighbors, and educational programs highlighting the benefits of Life Plan Community living. In July, progress on the South Wing was celebrated with a traditional Topping Out Ceremony, marking the placement of the final structural steel beam and recognizing the many partners who brought the project to this milestone.

The ceremony held special meaning for the Cypress Glen community with the recognition of resident Dr. Earl Trevathan, affectionately known as Dr. T. Now more than 100 years old, Dr. Trevathan is the father of the owner of North State Steel, the company responsible for the project’s structural framework. Earlier in the construction process, Dr. T personally delivered the first piece of steel to campus, arriving in full safety regalia and symbolizing both craftsmanship and resident involvement. Photographs capturing the first steel delivery and the July Topping Out ceremony serve as lasting reminders of the community pride and partnerships behind the project.

In celebration of Cypress Glen’s 38th anniversary, the community also unveiled a refreshed logo in July. Developed in partnership with Point B Communications, the new design reflects a stronger, more classic visual identity that better represents Cypress Glen’s evolving community and future vision.



Photo bottom right: Janice Wynn visits with Deputy Drifter, of the Pitt County Sheriff’s K9 department.

Civic Engagement and Public Service

Cypress Glen continued its tradition of civic engagement by hosting events that connect residents with local leadership. Pitt County Commissioners, County Manager Janis Gallagher, and members of the County leadership team met with residents to share information about county services, volunteer opportunities, and public initiatives.

The gathering concluded with a special presentation honoring Cypress Glen resident and former Pitt County Commissioner Beth Ward for her 25 years of dedicated service. A commemorative bench and plaque were unveiled in recognition of her lasting contributions to the citizens of Pitt County.

In October, Cypress Glen hosted a candidate forum for the November municipal elections, welcoming all candidates for Mayor, District City Council, and At-Large seats. The community also once again served as an official polling location, reinforcing its role as a trusted civic partner.

Excellence in Care and Operations

Operational excellence remained a cornerstone of Cypress Glen’s success. During the past year, the Health Care Center achieved a deficiency-free annual survey, underscoring the community’s unwavering commitment to regulatory compliance, safety, and the highest standards of resident care. The Memory Care Cottage also enjoyed a strong year, maintaining full compliance during quarterly county monitoring visits while continuing to deliver compassionate, person-centered care. Memory Care also completed a 3-year accreditation pilot program through the University of North Carolina at Chapel Hill.

Environmental Services and Dining Services consistently delivered high-quality support and hospitality, reflected in strong resident satisfaction and continued high health inspection ratings.

Cypress Glen upgraded its electronic health record system to MatrixCare 360, improving documentation accuracy and efficiency across departments and further enhancing quality of care. In addition, the LCS Signature Programs Health & Wellness Navigation, Heartfelt Connections, and Extraordinary Impressions maintained Gold level certification, reinforcing Cypress Glen's commitment to coordinated, high-quality care.

Dining Innovation and Transformation

Dining Services experienced a year of innovation and transition as operations moved to an onsite modular kitchen to accommodate renovations of the main kitchen. Meal service shifted to a buffet-style concept that was enthusiastically embraced by residents, offering greater customization and encouraging residents to try new menu options.

Looking ahead, the Dining Services team has begun planning and conceptualizing a new dining venue currently under construction. The vision includes a true fine dining experience featuring seasonal menus, tableside service, a full wine bar, wine dinners, and monthly brunch events—enhancements designed to further enrich daily life at Cypress Glen.

Education and Workforce Development

Cypress Glen continued to serve as a vital educational and workforce development partner in the region, providing thousands of clinical and internship hours to students from local colleges, universities, and high schools across healthcare, life enrichment, therapy, and public service disciplines. Many students later apply for employment at Cypress Glen, strengthening the community's long-term workforce pipeline.

Leadership and staff also remained deeply engaged in professional, civic, and faith-based service, contributing time and expertise to advisory boards, nonprofit organizations, and community initiatives.



Community Benefits and Outreach

Through educational partnerships, donated space, and charitable contributions, Cypress Glen provided nearly \$688,000 in total community benefits this year. These efforts supported local schools, healthcare education, food programs, shelters, and community organizations, reflecting Cypress Glen's enduring commitment to stewardship, service, and compassion. In addition, Cypress Glen participated in the 2025 Walk to End Alzheimer's through a combined contribution to the national Alzheimer's Association, made possible by the generosity and involvement of Cypress Glen residents and staff.

Looking Ahead

With strong performance, meaningful milestones, and deep community roots, Cypress Glen continues to move confidently into the future. From welcoming new residents and celebrating construction progress to advancing care excellence and community partnerships, the past year reflects a shared commitment to building a vibrant, connected community—today and for generations to come.

Photo top right: Debbie Pitts, Cypress Glen Music Therapist entertains staff members' children.

Wesley Pines

LUMBERTON, NC

Amy Hilburn, Executive Director

The 2024–2025 year was filled with remarkable achievements for Wesley Pines, each one a testament to our commitment to excellence and community. These milestones were cause for celebration and reflect the dedication of our team, residents, and partners.



Photo top right: The Holiday Band shown with residents Doris Peeler (bottom row center) and Virginia Johnson (bottom right) Photo bottom left: Jessica Stanley, Healthcare Admission Director and Mrs. Shirley Stockton (resident)



Karen Cribb, Director of Nursing, was awarded the LCS Mary Harrison Award for receiving a deficiency-free survey. The Harrison Award was established in 2010 to honor LCS employee Mary Harrison, who worked for the company for over 30 years, and was instrumental in designing and implementing most of the organization's current health care programs and policies. This was the second year in a row that Mrs. Cribb received this distinction on behalf of the community.

Charles Davis, Plant Operations and Security Director was awarded a silver LCS Safeties Award. To qualify, a community must be in the LCS Advantage Program for at least a full year and have met their workers' compensation goal for the policy period which ended June 30th. Wesley Pines ranked in the top 5–10% of their goal and received \$1,500 for safety awareness and promotions.

Community Benefit: \$56,472

This figure represents the services provided to the greater community by Wesley Pines.

Benevolence Provided: \$1,016,820

Wesley Pines provides benevolent assistance to residents who, through no fault of their own, can no longer meet their financial obligations.

Jessica Stanley, Healthcare Admissions Director graduated from the LCS ExSellerator Program on August 21st. The LCS ExSellerator Program aims to create a pipeline of marketing and sales talent as part of succession planning, as well as to provide enhanced knowledge of the marketing and sales function and leadership acumen. This one-year development experience was named after the LCS sales philosophy, ExSell, and was designed at the behest of Marketing & Sales leadership. Bringing emerging sales and marketing leaders together to focus on development and to create a pipeline for future opportunities was new for this discipline at LCS, which develops, owns, manages, and markets senior living communities. During Jessica's time in the leadership program, she participated in various training sessions and concluded the program by presenting her capstone project on Waitlist Management and Engagement.

In February 2025, **Kimberly Walters**, Sales and Marketing Director; Jessica Stanley, Healthcare Admissions Director; and **Amy Hilburn**, Executive Director were awarded the LCS Road to 95 Award at the LCS Sales and Marketing Conference held in Orlando, Florida. The "LCS Road to 95" award, also known as the Road to 95+ High Occupancy Award, is a recognition for achieving and maintaining a high occupancy rate, specifically 95% or higher, for a community. This award is a testament to the collaboration between Wesley Pines' sales and operations teams.

During 2025 the Wesley Pines team reached 100% occupancy in both Assisted Living and Skilled Nursing. To celebrate these grand achievements, team celebrations were a Mexican themed luncheon, an ice cream social and an apple bar with all the toppings.



Photo top right: Charles Davis, Plant Operations Director shown with his children and residents Finley and Ruth Read. Photo bottom left: Drone footage of the crowd at Shaggin' Under the Pines.



In May 2025, **Amy Hilburn**, Executive Director attended the LCS Senior Living Management Operations Business Unit Meeting in Houston, Texas. At the meeting, Wesley Pines was recognized for outstanding Employee Satisfaction, Resident Satisfaction, Low Employee Turnover, and for receiving the Mary Harrison Award for a deficiency-free survey. Within the Sorenson Business Unit, Wesley Pines was 1 of 3 tied for the Summit Award along with Cypress Glen and another LCS managed community.

Wesley Pines has achieved the Gold level for all three LCS Signature Programs:

- **Extraordinary Impressions** – this effort was led by Amy Hilburn, Executive Director and Allen Lloyd, Director of Human Resources
- **Health and Wellness Navigation** – our program is collaboration across our interdisciplinary team lead by Amy Jo Rooks, Director of Social Services and Health
- **Navigation Heartfelt Connections** – our dementia training and programming efforts are spearheaded by Stephanie Ward, Community Life Services Director

Allen Lloyd, Human Resource Director coordinated the annual Employee Appreciation Party on November 6th to celebrate employee milestones. Service pins were given for one-year, 3-years, 5-years, 10-years, 15-years, 20-years, 25-years, and 30-years of service.

We are pleased to announce this year's Louis M. and Maxine Locklear Amos Scholarship winners. In years past we have had only one winner, however this year we were fortunate to have three! Prior to our beloved Mrs. Maxine Amos' passing, she was compelled to increase the number of scholarships awarded. Always the encourager, Mrs. Amos would have certainly cheered these ladies on as they furthered their education.



The 2025 Scholarship Recipients:

- **Christy Oxendine**, Dining Supervisor who is attending the University of North Dakota to pursue Certified Dietary Manager and Certified Food Protection Profession certifications.
- **Shelia Tatum**, Minimum Data Set (MDS) Coordinator who is attending Southeastern Community College and will receive her Advance Nursing Degree and become a Registered Nurse.
- **Laisha Mitchell Goribay-Lazaro**, Certified Nursing Assistant who is attending Bladen Community College and will receive a Licensed Practical Nurse certificate.

During 2025, Wesley Pines did not receive an annual survey from the North Carolina Department of Health Services Regulation. In preparation for the yearly survey, the health care team received a mock survey by Cindy Bennett, LCS Clinical Nurse Specialist in July 2025.

First photo top left: Stephanie Ward, Community Life Services Director is shown with the LCS Heartfelt Connections award she received on behalf of the community. Second photo top left: Karen Cribb, Director of Nursing is shown with the LCS Mary Harrison award after receiving a deficiency-free survey.

Grant participation

- **Stephanie Ward** and **Jennifer Williams** of our Community Life Services team have been working with Life Bio Memory to create storybooks of residents' lives. For the project residents or their families can either record or write their life story which is turned into a book for residents and families to keep, and a one-page sheet that provides highlights into the resident's life and preferences.
- Fayetteville State University selected our Nursing Department to be the recipient of an American Nurse Foundation Burnout Awareness, Support, and Empowerment (B.A.S.E) Grant. The purpose of the grant is for implementation of peer and leadership support in rural or long-term care settings. The focus is to combat nurse burnout and to date the program has created a recharge room for nurses to decompress, refocus and reenter their shift with calmness and clarity, as well as provided training, resources, and support. **Karen Cribb**, Director of Nursing and **Jamie Kessinger**, Assistant Director of Nursing have served as the Wellness Champions while **Temeshia Regan**, LPN, and **Aprillee Cox**, RN served as Wellbeing Ambassadors for the grant.
- QSource was awarded a Civil Money Penalty Grant to provide a collaborative partnership to improve our falls program. Wesley Pines is 1 of 12 skilled nursing participants across the state. Working with QSource and the resources provided through the N.C. Culture of Safety Center, we have completed a fall program analysis, identified barriers of communication, and have begun implementing the recommended changes.

Always supportive of the Alzheimer's Association efforts to help find a cure for the dreaded disease, Wesley Pines raised funds for the 2025 Alzheimer's Walk to End Alzheimer's held at Segra Park in Fayetteville on October 25th. The Wesley Pines team raised \$1,300 for the cause.

Wesley Pines achieved Medicare 5-Star accreditation during 2025 and maintained the rating for most of the year. The rating comes from an overall score combining Health Inspections, Staffing, and Quality Measures.



Expansion Project

New construction will soon be underway at Wesley Pines! The UMRH Board has voted to update several areas of the campus showing the commitment to their communities. The project includes expansion of the therapy suite, addition of four private rooms, and refurbishment of four semi-private rooms to private rooms, refurbishing the current therapy suite into an activity suite, expanding the assisted and independent living dining room, library, assisted living activity room, and the addition of a billiards room. With LCS Development guidance of this project, we expect the board to approve the project to begin in January 2026 with completion in late 2026.

Promotions

In September 2025, Ms. Annie Deal, one of Wesley Pines' long-time employees, was promoted to become the new Environmental Services Supervisor. Since her transition from Laundry and Housekeeping, Annie trained with staff across all areas of Environmental Services and has done a wonderful job fulfilling her new responsibilities.

Jamie Kessinger was hired as our Assistant Director of Nursing in January 2025. Even though she is new to the position, she has worked with us for several years part time. Jamie has been eager to learn her new role and excited to join the Wesley Pines team full-time. She graduated from the University of North Carolina at Pembroke with a bachelor's degree in nursing in 2014. Her nursing career began at Southeastern Regional Medical Center in the Intensive Care Unit. Over the years she has worked part time in various nursing positions but dedicated most of her career to the Gibson Cancer Center. Jamie is from Fairmont but now resides in Lumberton. She has two daughters, Linley and Reese, and one fur baby, Oatmeal. During her free time, she enjoys spending time with family, traveling, dancing, and going to the beach.

Photo top left: Pat Cerace, Carolyn Britt and Margaret Watts display their Christmas portraits. First photo bottom right: Amy Hilburn, Executive Director; Kimberly Walters, Marketing Director; and Jessica Stanley, Healthcare Admission Director enjoying the LCS VIBE Conference in Orlando, Florida. Second photo bottom right: Amy Hilburn, Executive Director receiving the JD Power award.



Special Events

Throughout the year the Food and Beverage team host several dining events for residents. James Sandrock, Food and Beverage Director, and his team plan special holiday meals such as Easter, Mother's Day, Memorial Day, Independence Day, Father's Day, Thanksgiving and Christmas. One major undertaking is for the Shaggin' Under the Pines event which was held on May 16th and was open to the greater community.

Wesley Ridge

LUMBERTON, NC



Wesley Ridge Advisory Board above: Left to Right: Roy Hester (Partnership Property Management - PPM), Teresa Lawson (PPM), Robin Sagendorf, Amy Hilburn (Wesley Pines), Jonathan Erickson (UMRH), Melissa Humphrey (Wesley Ridge), Wilson Ray (Wesley Pines); Not Pictured: Barbara Andrews and Clyde McKee. Photo top right: Wesley Ridge apartment.



Wesley Ridge is a 24-unit one- and two-bedroom apartment community located adjacent to the Wesley Pines campus in Lumberton, N.C. Wesley Ridge is a division of UMRH Affordable Housing.

The Wesley Ridge community has six, one-story buildings constructed of wood frame, vinyl siding, and brick veneer. Each building contains four apartments: Three one-bedroom units of approximately 625 square feet and one two-bedroom unit of approximately 840 square feet. Wesley Ridge is open to senior adults age 62 and older and to persons 18 years of age and older with disabilities. To become a resident, persons must earn no more than 60% of the median income in Robeson County, N.C. This translates to approximately \$30,840 for a single person and \$35,220 for a couple. Residents of Wesley Ridge have access to Wesley Pines Health Center should the need arise. The community is managed by Partnership Property Management (PPM), of Greensboro, N.C., and Florence, S.C. The community has an Advisory Board which meets twice annually. Mrs. Teresa Lawson is the property manager. Admission is on a first-come, first-serve basis. Applicants must pass a security check, drug test, and credit check.

Contact Information on How to Become a Resident

Croasdaile Village

Danielle Brown
Marketing Director

2600 Croasdaile Farm Pkwy.
Durham, NC 27705
(919) 384-2476

DanielleB@umrh.org
www.croasdailevillage.org

Cypress Glen

Elizabeth Jenkins
Marketing Director

100 Hickory St.
Greenville, NC 27858
(252) 830-7066

ejenkins@umrh.org
www.cypressglen.org

Wesley Pines

Kimberly Walters
Marketing Director

1000 Wesley Pines Rd
Lumberton, NC 28358
(910) 272-3006

kimberlyw@umrh.org
www.wesleypines.org

Wesley Ridge

Robin Sagendorph
Manager

990 Wesley Pines Rd.
Lumberton, NC 28358
(910) 618-0361

wesleyridge@partnershipppm.com
www.umrh.org/wesley-ridge

A Year of Impact & Gratitude

As we reflect on the past year at the United Methodist Retirement Homes, we are reminded that philanthropy is ultimately about people—neighbors caring for neighbors, and a community coming together to ensure that everyone can age with dignity, security, and purpose.

We are deeply grateful for the generosity of our donors who continue to believe in the mission of The United Methodist Retirement Homes (UMRH) and its communities: Croasdaile Village, Cypress Glen, and Wesley Pines. Your support—whether given through time, talent, or treasure—has strengthened our ability to provide compassionate care and meaningful experiences for residents and staff alike.

At the heart of our work is benevolent care. Through the generosity of donors, we are able to support residents who have outlived their financial resources, ensuring they can remain in our communities and continue receiving the care they need. This commitment reflects our core values and the promise we make to those who call our communities home.

Giving Overview

In Fiscal Year 2025, **donors gave a total of \$444,025** in support of the UMRH Foundation and United Methodist Retirement Homes. These gifts included:

- **\$389,495** in new outright gifts
- **\$36,630** raised through the UMRH Golf Tournament
- **\$17,900** from the Mother’s Day Offering

These funds directly supported benevolent care, employee education through scholarships, campus improvements, and programs that enhance quality of life across all three communities.

Highlights of Giving

This year’s generosity was expressed in many meaningful ways, including:

Several leadership gifts of \$50,000 to \$100,000 with many designations including those designated to support benevolent care and ensure residents facing financial hardship continue to receive uninterrupted care, namings in the Cypress Glen Capital Campaign, funding and or creation of scholarship funds, and beautification efforts of the Hallas Nature Sanctuary at Croasdaile Village.

A planned gift commitment that will strengthen the Foundation’s long-term sustainability and future impact.

Several restricted gifts supporting community enhancements, life-enrichment programming, and staff development. We were also blessed to have so many people giving diligently to the Tree of Love at each community or giving tributes to honor or memorialize their loved ones.

Continued growth in donor participation across all communities, reflecting a shared commitment to the well-being of residents and staff. **Each gift—large or small—played an essential role in advancing our mission.**



Caleb W. Baker
UMRH Director of Development

Investing in Our Staff Through Scholarships

The UMRH Foundation is proud to administer resident-funded scholarship programs that support employees who are pursuing further education. By investing in staff, donors help strengthen the quality of care and services provided to residents while creating opportunities for personal and professional growth.

Scholarship support this year benefited employees at all three communities. Through long-standing endowments supporting healthcare and general education which are resident-supported, staff members have been able to continue with their education goals. Here are just a few figures:

- Since 2013, The Edward C. and Betty M. Matthews Scholarship has **awarded 46 scholarships** for a total of **\$46,000**.
- Since 2004, The Kathleen Knott Scholarship in Healthcare Education has **awarded 90 scholarships** for a total of **\$53,025**.
- Since 2004, The John D. Fassett Scholarship has awarded **174 scholarships** for a total of **\$196,500**.
- Since 2023, The Louie M. and Maxine Locklear Amos Scholarship has awarded **5 scholarships** for a total of **\$6,250**.

These programs are a powerful reflection of the partnership between residents and staff, and we are grateful to all who continue to support them.



Events and Community Support

The annual UMRH Golf Tournament once again brought together friends, sponsors, and supporters for a day of fellowship and fun, **raising \$27,090 in support of benevolent care**. In addition, seasonal appeals and special offerings throughout the year provided critical resources to meet ongoing needs across our communities.

Looking Ahead

As we look to the future, we remain inspired by the generosity and trust of our donors. Whether through current gifts, planned giving, or volunteer involvement, your support makes a lasting difference in the lives of residents and staff.

On behalf of the UMRH Foundation and the communities we serve, thank you for your continued commitment and belief in our mission. Together, we are creating caring communities where acceptance, compassion, and dignity prevail.

Photo top right: The UMRH Foundation Golf Tournament fundraiser is popular with both staff and residents raising funds for our Benevolent Care Fund. Croasdaile Village Team members, Craig Lloyd and Jeff Heyward, enjoy a day of golf. Photo bottom left: Teeing off at the 26th Annual United Methodist Retirement Homes Foundation, Inc. Golf Tournament.

Get Involved

Here are a few ways to support the mission of the

Foundation: Many donors make outright gifts of cash, securities, and other assets for projects that improve the quality of life of residents. Among the projects are benevolence, employee scholarship funds, capital projects, life enrichment, and campus beautification.

Make a current gift:

- Write a check to UMRH and designate in the memo line where you would like those funds to be utilized.
- Give a gift of appreciated stock and not have to worry about capital gains.
- You can direct moneys from your required minimum distribution (RMD) of your retirement account directly to the Foundation as a qualified charitable distribution, therefore avoiding any tax liability on those funds.
- Time to part with your car? Let us take care of it for you. From time to time, we receive a car from a resident and post the car for sale internally within the community so that an employee can buy it. It's a win-win-win. You get to write off the value of the automobile, the employee gets reliable transportation at an affordable price, and we get funds to support benevolent care.
- Naming opportunities are available to those who wish long-term recognition of friends or loved ones. Naming's can be associated with physical facilities, or with endowment funds, scholarship funds, and other non-physical assets.
- Unrestricted gifts are the most flexible type of support, allowing Trustees to approve them for use where needed most.

Consider a future gift:

- Consider adding UMRH as a beneficiary in your will, IRA, or life insurance policy.
- Set up a Charitable Gift Annuity through the Foundation that will provide you with a guaranteed income, tax benefit, and a donation to the Foundation later on.
- Work with your estate attorney to create a Charitable Remainder Trust. UMRH acts as a trustee to several trusts and also acts as a beneficiary to several others.

Useful Verbiage for Estate Planning:

This year, many people have contacted the Foundation requesting example verbiage for planning their wishes for their estates. Below, you can find sample wording. We would be happy to work with you if you needed additional wording for a more specific gift.

"I give, devise, and bequeath to the United Methodist Retirement Homes Foundation (EIN # 56-1870172), a nonprofit located in Durham, N.C., the sum of [\$\$ amount (or a percentage)] of my estate. It is my request that this gift be used for the benefit of the [Name Campus or UMRH] [Name Specific Donor Purpose/ Benevolent Care Endowment or Unrestricted Fund]."

We welcome anyone who would like to contribute to these worthy causes to please do so by contacting our office.

Remembering Maxine Amos

I had the privilege of speaking to Mrs. Amos at least 20 times either in-person or on the phone and every time we talked, she would always say, "Remember Jesus loves you and so do I." Those words always hit so powerfully. You could always feel her joyful spirit, even when times were not so easy. She created the Louie M. and Maxine Locklear Amos Scholarship at Wesley Pines, the first scholarship for employees of Wesley Pines.



Mrs. Amos was a lifelong educator/guidance counselor, a member of the Lumbee Tribe of North Carolina, and friend to many. She was considered a trailblazer. During her time as a coach at Morganton, Mrs. Amos' team won the tournament for the Western division. She was the only American Indian at Morganton High school. She was the basketball coach, coached all the girl's activities and the cheerleaders. In 1966, her team was the first in N.C. to have a Lumbee coach and two African American students, while the remaining members of team were white.

In 2023, she received the Governor's Award for Volunteer Service. She volunteered feeding elders in the community, volunteered at her church, on the campus of UNCP and many other areas of service.

Mrs. Amos passed away in July 2025 but her legacy will live on in Lumberton. With an estate gift that will add to the endowed scholarship fund, Wesley Pines employees will be able to "Keep going!"

**Maxine lived by the biblical principal:
*Freely give and you will freely receive.***

She said, "For me, three things that have always been important in my life have been family, religion and education. My family has always been important to me. My mother was a wise woman. She always stressed the importance of getting an education."

She continued with, ***"I've always said if I can help somebody along the way, my living shall not be in vain."***

**May we all strive to love
like Mrs. Amos!**

Donor Thanks

Your generous donations have been a great support to The UMRH, Inc., communities for 2024-2025.

OCT. 1, 2024 THRU SEPT. 30, 2025

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The United Methodist Retirement Homes, Inc.
Thanks You for Your Generous Donations!

Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

Foundation Ethics and Donor Protection

The Foundation and its volunteers and staff representatives always consider the interests of the donors as the first priority in planning gifts. Information learned by any representative of the Foundation about a donor or the donor's assets or philanthropic intentions is held in strict confidence. It is neither the province of the Foundation nor its volunteers or staff to give legal, accounting, tax, or other advice which is usually reserved to the donor's counsel while acting on the donor's behalf.

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the organization's most recent financial statements.
- To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgement and recognition.
- To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

*Our 2025 Back Cover Features:
Mr. and Mrs. (Robin) Gene Clark*

“Have you included The United Methodist Retirement Homes Foundation in your will or living trust?”

UMRH.ORG

Ways to Give:



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