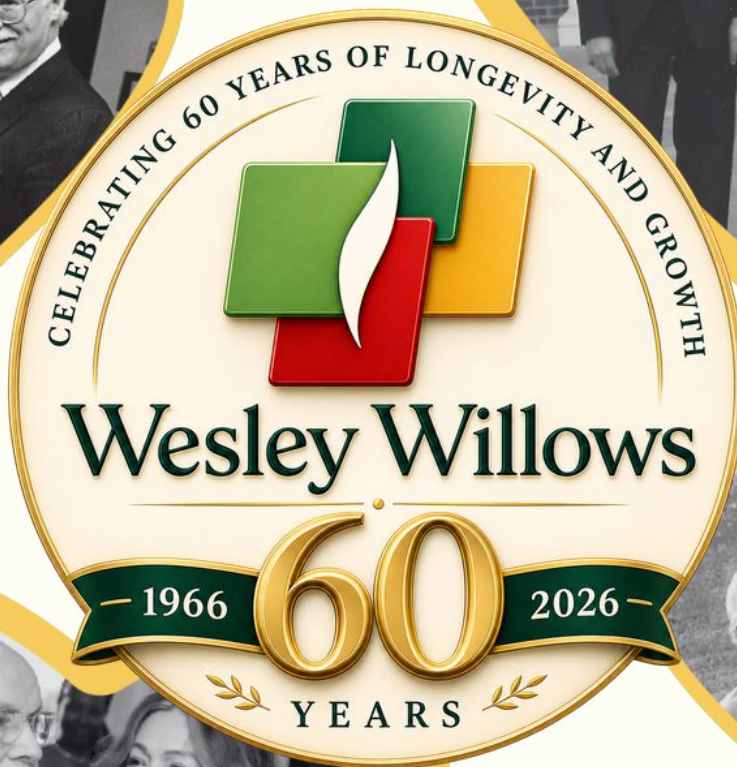
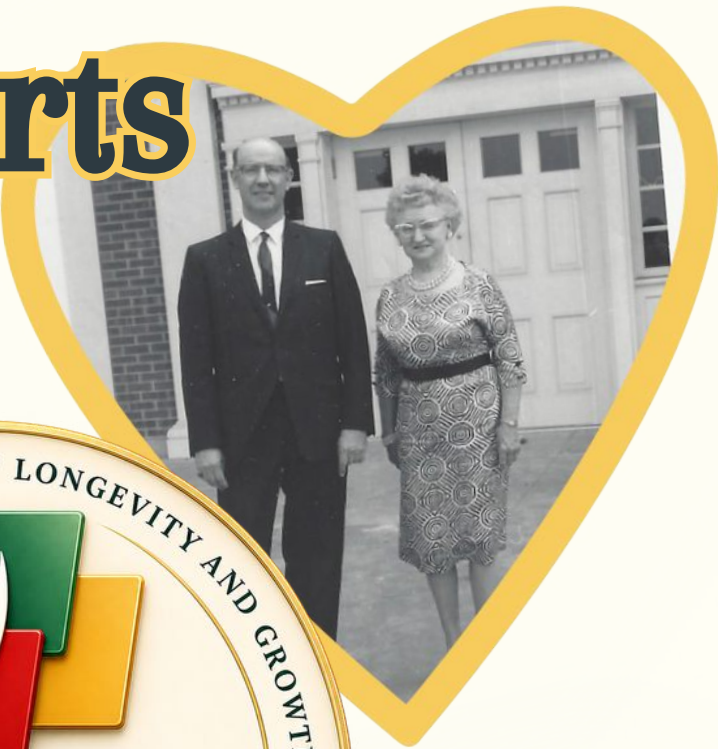
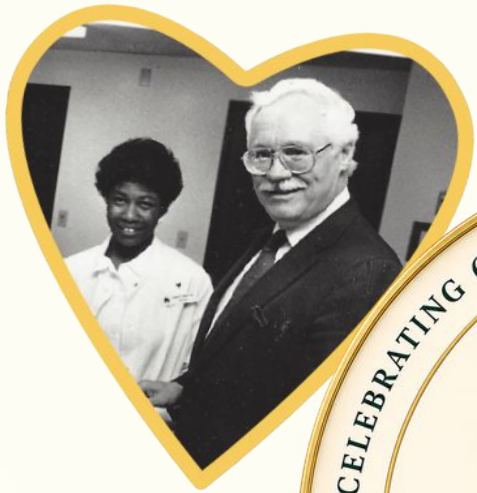


Our Hearts



Our Legacy

THE JOURNEY 2026

The Journey 2026



Frances Salinas
President & CEO



David Schmitt
Board Chair

Fiscal Year 2026 marked a major milestone for the Wesley Willows organization. Sixty years ago, Clara Royston became the first person to call our community home. Now, six decades later, our residents remain at the heart of everything we do. Our legacy is the extraordinary life journey and exceptional well-being we inspire every day at Wesley Willows, Peterson Meadows, and Highview in the Woodlands.

While we are proud of our organization's strong history of serving the Rockford region, we refuse to become complacent. The only way to maintain our legacy is to continuously enhance and adapt the programs, services, and amenities we offer to the ever-changing needs of the people we serve. We accomplish this by listening to the residents and staff of today and anticipating the needs of those we will serve and employ in the coming years.

We created the Vision 2030 Strategic Plan in Fiscal Year 2025 to position our organization as a senior care leader for generations to come. I am pleased to report that our Leadership Team has made tremendous progress on the first year of the plan. The team is on track to bring our remarkable vision for 2030 to life. (You can view a summary of the plan and our progress so far on the next page.)

Our communities continued to grow and celebrate extraordinary achievements in Fiscal Year 2026. Nowhere has this growth been more apparent and exciting than at our newest community, Highview in the Woodlands. Since affiliating with Highview in 2024, our team has done a remarkable job of renovating the

facilities and providing the staff with the resources they need to provide extraordinary care. We are starting to see the fruit of this labor as Highview's occupancy doubled in the last year alone!

Occupancy also remains high at Peterson Meadows, where residents and staff celebrated two exciting additions to the campus. An outdoor bocce ball court is a new favorite gathering space for active recreation. Adjacent to the court is a Veterans Memorial Patio, a fitting addition to a campus where nearly a quarter of the residents are Veterans.

This year also brought a significant addition to the Wesley Willows campus with the grand opening of the Wesley Willows Academy. This eight-week CNA training program was made possible through a generous donation by residents Phil and Susan Zimmerman. The program reflects our deep belief in investing in people who feel called to serve others and who will one day provide compassionate, high-quality care to our residents.

Ultimately, Fiscal Year 2026 was a year of innovation, preparation, and celebration with our residents at the heart of all of it. We revolutionized how residents and staff communicate internally with the implementation of the Wellzesta, MemoMate, and Motivosity platforms. We purchased a property in Rockton with the intention of further expanding our service offerings. And we honored resident Dick Leighton with a Lifetime Achievement Award at the inaugural Our Hearts, Our Legacy Gala.

Our organization is so active and adventurous because we believe senior living should be active and adventurous for generations upon generations to come. We are eager to continue this legacy of extraordinary senior living and excited to share the journey with all of you.

VISION 2030 - PROGRESS SO FAR:

Strategic Plan Update

VISION STATEMENT: *We inspire the well-being and life journey of those who live and work in our communities.*



Foster Whole-Person Wellness Through Integrated & Brain Health Strategies



Cultivate a Culture of Well-Being

- Launched employee engagement initiatives
- Enhanced leadership development
- Increased HR support capacity
- Expanded well-being resources

Develop an Integrated Healthcare System

- Established planning committee
- Advanced on-campus care access
- Developed a tiered healthcare model
- Strengthened workforce development through CNA training

Establish a Cognitive Wellness Brand

- Launched cognitive wellness survey for new residents
- Finalized brain health program portfolio
- Established Brain Health & Well-Being Department



Expand Service Reach & Market Presence



Target New Geographic and Demographic Markets

- Identified geographic & demographic areas to expand market reach
- Partnered with Senior ROI to determine additional market expansion areas

Expand Programs and Services into Middle-Income Markets

- Gathered data to quantify the mid-market senior population
- Identified & evaluated mid-market models that have achieved national success

Evaluate Potential Opportunities for Growth

- Networked with industry organizations
- Developed a baseline for affiliation/acquisition opportunities
- Purchased Rockton property for future development



Transform Campus Infrastructure & Technology to Support a Smart, Sustainable Future



Develop a Comprehensive Master Plan for Infrastructure and Facilities

- Evaluated current dining venues & community areas
- Identified spaces on campus for new dining venues & community engagement
- Defined what physical spaces will become & provide in alignment with strategy, brand, & cognitive wellness initiatives

Enhance Technology and Create Smart Campuses

- Deployed the Wellzesta resident engagement app
- Implemented new network security firewall on all campuses
- Installed cabling & infrastructure to support enhanced connectivity, reliability, & future technology expansion
- Improved Wi-Fi connectivity, reliability, & performance

Accomplishments

- Celebrated the 60th anniversary of the first resident moving into the Wesley Willows community.
- Purchased property for the development of a future senior living community in Rockton, IL.
- Hosted inaugural Our Hearts, Our Legacy Gala at Rockford Country Club to launch Securing Today, Ensuring Tomorrow Campaign.
- Established the Wesley Willows Academy, a state-approved CNA training program, advancing workforce development and preparing future generations of compassionate caregivers.
- Completed initiatives to keep progress on track for the first year of the Vision 2030 Strategic Plan.
- Introduced new technological solutions, Wellzesta, Memomate, and Motivosity, to improve efficiency and effectiveness of internal communication with residents and staff.



Mission

We promote active, secure lifestyles for seniors through ongoing, personalized care.

Vision

We inspire the well-being and life journey of those who live and work in our communities.

Core Values:

**Integrity
Excellence
Safety & Security**

**Relationships
Fiscal Responsibility
Accountability**

Honoring a Generous Legacy

Resident Dick Leighton Honored at Our Hearts, Our Legacy Gala

The Rockford Country Club ballroom buzzed with anticipation for what everyone knew would be a special night. Residents, members of the Board of Trustees and staff, community leaders, corporate partners, and their loved ones filled the space dressed in their best, savoring the opportunity to socialize, sample delicious hors d'oeuvres, and bid on an impressive selection of silent auction items.

The occasion was the Our Hearts, Our Legacy Gala, a celebration of and benefit for the extraordinary communities at Wesley Willows, Peterson Meadows, and Highview in the Woodlands. Attendees were eager to hear about and support the organization's many programs and initiatives for enhancing the lives of its residents.

Soon they were ushered into the beautifully decorated dining room for an elegant dinner and an inspiring gala program. Speakers reflected on the sixty-year history of the Wesley Willows organization and told stories of the countless lives touched by its mission. The program also featured a glimpse of the future, as Wesley Willows President and CEO Frances Salinas gave an overview of the organization's Vision 2030 strategic plan. Funds raised during the evening would directly support these strategic priorities to enhance residents' lives.

The gala would not have been complete without honoring one of the people who makes Wesley Willows so extraordinary. The organization was pleased to give its first ever Lifetime Impact Award to longtime resident Mr. Dick Leighton.

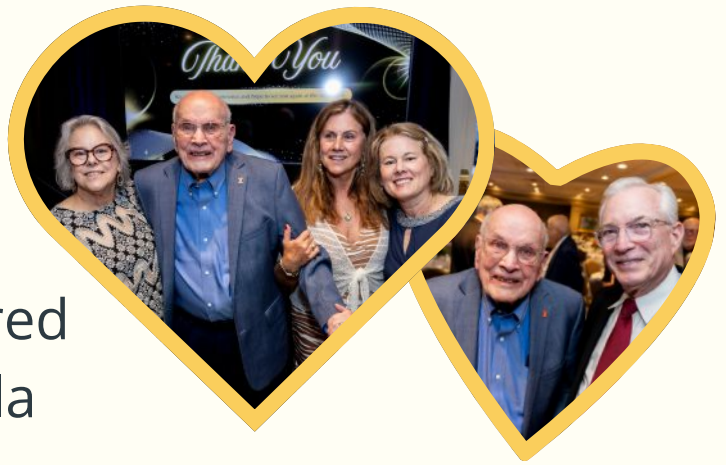
A retired Chief Financial Officer of Barber-Colman Company, Mr. Leighton has been a steadfast advocate for civic engagement and philanthropy throughout

northern Illinois. He has dedicated more than 50 years to Rockford Rotary and has served in leadership and advisory roles supporting numerous charitable organizations, including the Community Foundation of Northern Illinois, where he is recognized as a Trustee Emeritus, and the YMCA of Rock River Valley.

Mr. Leighton has also made a lasting impact on Wesley Willows with his generosity. He established the Dick & Grace Leighton Professional Development Fund in 2024. This endowed fund is annually allocated to several professional development opportunities for Wesley Willows employees.

Attendees heard all about Mr. Leighton's legacy of generosity through a video tribute featuring reflections from his daughters, friends, and former colleagues. Two of those friends, Mike Gann and Wray Howard also shared tributes to Mr. Leighton from the stage. Finally, Wesley Willows Chair of the Board David Schmitt and President and CEO Frances Salinas presented Mr. Leighton with his award. He gave a characteristically humble and gracious speech and was showered with well-deserved applause from all in attendance.

Wesley Willows communities exist to serve and honor incredible people like Mr. Leighton. The Our Hearts, Our Legacy Gala was a fitting tribute to how the organization helps residents celebrate life every day.



By The Numbers

Condensed Combined Financial Summary

Year ended June 30, 2026

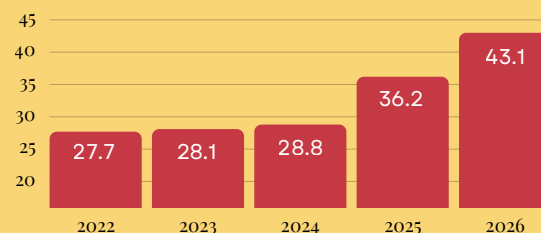
Financial Results

Revenues	\$ 43,080,477
Operating Expenses	\$ (48,028,493)
Investment Earnings	\$ 9,426,553
Contributions	\$ 1,097,572
Interest Expense	\$ (1,216,705)
Excess Revenue Over Expenses	\$ 4,359,404

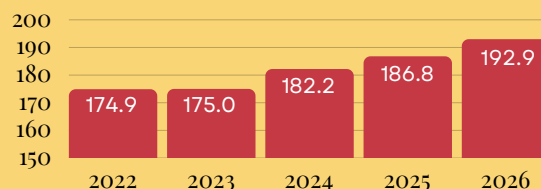
Financial Position

Cash and Equivalents	\$ 4,267,185
Receivables and Other Assets	\$ 4,363,669
Investments	\$ 63,922,569
Property and Equipment, Net	\$ 120,308,909
Total Assets	\$ 192,862,332
Accounts Payable	\$ 3,421,698
Accrued and Other Liabilities	\$ 5,237,029
Bonds Payable, Net	\$ 31,517,911
Refundable Entrance Fees	\$ 47,483,018
Deferred Revenue	\$ 33,870,242
Net Assets	\$ 71,332,434
Total Liabilities and Net Assets	\$ 192,862,332

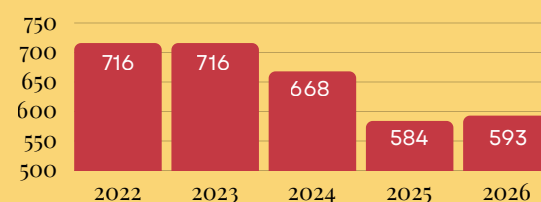
Resident Services Revenue (\$ millions)



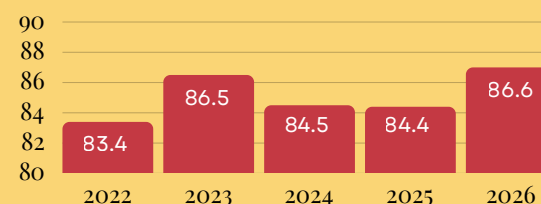
Total Assets (\$ millions)



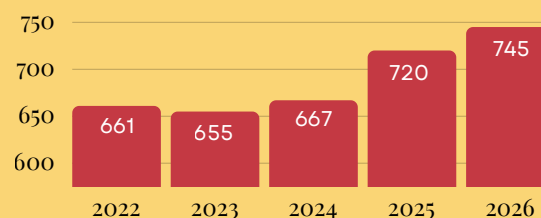
Days Cash on Hand



Total Occupancy %



Total Occupied Units at 6/30



2026 Report Card

Subject	Goal	Actual	Achieved
Overall Occupancy	87.4%	86.6%	No
Increase in Unrestricted Net Assets	\$ 3,000,025	\$ 3,690,750	Yes
Good Samaritan Endowment Fund	\$ 19,630,097	\$ 21,787,435	Yes
Peterson Meadows Endowment Fund	\$ 200,895	\$ 211,966	Yes
Provided Appropriate Charitable Support	\$ 925,148	\$ 1,064,376	Yes
Total Gifts Received	\$ 680,000	\$ 1,097,572	Yes
Board Member Attendance	80%	91%	Yes

Investing in the Future of Senior Health Care

The Story of the Wesley Willows Academy CNA Training Program

On May 16, 2026, Wesley Willows celebrated the opening of the Wesley Willows Academy, an eight-week Certified Nursing Assistant (CNA) training program created to prepare students for rewarding careers in health care while strengthening the local workforce. The program includes classroom instruction, hands-on skills lab practice, and supervised clinical experience, equipping students to sit for the Illinois CNA certification exam upon completion.

The program was made possible through a generous donation from Wesley Willows residents Phil and Susan Zimmerman. As retired medical professionals, they shared a passion for supporting the next generation of caregivers and saw the academy as a meaningful way to invest in the future of health care. "We saw the need for more excellent caregivers in the healthcare industry," said Susan Zimmerman. "Why not make those opportunities possible right here at Wesley Willows?"

Wesley Willows Executive Director Jessica Story and Program Instructor Teresa White played key roles in developing the academy, securing state accreditation, and creating a program designed for student success.

"The Wesley Willows Academy is more than a training program — it's an investment in the future of healthcare and in our local community," said Story. "We are creating opportunities for individuals to grow professionally while strengthening our ability to deliver exceptional care."

At the ribbon-cutting ceremony, Story and White were joined by members of the Board of Trustees, the leadership team, and the academy's first cohort of eight students, all of whom would go on to successfully complete the program. As of September 2026, 18 students have graduated from the academy, and seven of them joined Wesley Willows as employees.

Susan Zimmerman was also present at the ribbon cutting and honored for her family's generous gift. Sadly, Phil had passed away before he could see the program that he'd helped fund come to fruition. Still, Susan was sure he'd be proud.

"Phil would be so pleased with this program," said Susan. "Jessica and her team have done such a wonderful job of putting it together. It is very well run, and I look forward to seeing it produce excellent caregivers for our community for many years to come."



Celebrating 42 Years of Extraordinary Service

On June 30, 2026, the Wesley Willows family gathered to celebrate the retirement of our longest tenured employee: Jonelle Dougherty. Jonelle served as a Housekeeper at Wesley Willows for over 42 years! Thank you, Jonelle, for the countless lives you've touched over the years. Our residents and staff will miss you greatly! We wish you all the best in your retirement.



Board of Trustees

David Schmitt

Board Chair

Jack Croffoot

Michael Gann

Joseph Garry

Mark McClenathan

Frances Salinas

Samuel Schmitz

Brent Scott

Don Williams

Tammy Zurfluh

Thank You...

*to all of our residents, friends,
and partners for your generous
giving in Fiscal Year 2026.*

**Interested in Giving to Our 501(c)(3)
Not-for-Profit Organization?**

Please use the QR code to learn more.



Executive Leadership Team

Frances Salinas

President & CEO

Annie Boltz

Corporate Director of
Culinary Operations

Brandon Burkel

Corporate Director of
Facilities & Grounds

Stephanie Cortes-Cruz

Chief People & Culture Officer

Jenny Frystak

Executive Assistant to the
President & CEO

Travis Gleinig

Chief Information Officer

Alexandria Lueth

Chief Financial Officer

Natasha McNeal

Vice President of Advancement

Brett Nelson

Chief Operating Officer

Jennifer Ulmer

Vice President of Community
Operations



Wesley Willows

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