

ARBOR ACRES

*Living Our
Values*



2025
in Retrospect

Stewardship • Trust • Excellence • Well-being • Artistry • Respect • Diligence

Arbor Acres Guiding Principles

Our Spiritual Foundation

Our faith leads us to do good things for older adults and those who serve them.

Our Mission

We create communities that celebrate the art of living.

Our Vision

Setting the stage to embrace aging's possibilities.

Our Values:

Stewardship: We honor our commitments while planning for tomorrow.

- We are the guardians of our legacy and the creators of our future.
- We nurture growth through thoughtful oversight.

Trust: We communicate honestly, timely, and effectively.

- We share good news fast and bad news faster.
- We seek opportunities to do better and deepen trust.

Excellence: We seek innovative ways to be better each day.

- We exceed expectations.
- We don't follow the herd but will learn from others.

Well-being: We promote purpose, security, and balance.

- Life is better together.
- We believe aging is an art form.

Artistry: We celebrate our individuality and unique talents.

- Everyone is an Artist and can create beauty.
- How something gets done is just as important as getting it done.

Respect: We value everyone's history and potential.

- A warm smile and a "hello" are the first step in building community.
- We assume others' intentions are noble.

Diligence: We achieve through thoughtful and energetic effort.

- There is beauty in doing something well.
- We are generous with our spirit and our resources.

The Art of
Living

Living Our Values

Since opening our doors in 1980, Arbor Acres has been shaped by a simple but powerful belief: that aging deserves dignity, creativity, and care. For 45 years, generations of residents, employees, families, and leaders have brought that belief to life through moments of service and celebration, through change and growth, and through a shared commitment to community. What began as a bold, hopeful vision has matured into a living legacy – a vision built thoughtfully over time and strengthened by the people who have called Arbor Acres home.

Our mission calls us to create communities that celebrate *The Art of Living*. We believe aging should be embraced as a season rich with purpose, passion, and promise. At Arbor Acres, this belief comes to life through relationships built on **trust**; thoughtful **stewardship** of what has been entrusted to us; and an unwavering commitment to **excellence** – always in service to one another.

Well-being lies at the heart of this work – understood holistically as the integration of body, mind, and spirit. Life here is better together, shaped by balance, purpose, and connection. Here, everyone is an artist capable of creating beauty and meaning; “**Artistry**” leads our conviction that how something is done matters just as much as what is done.

Respect honors each person’s history and potential – beginning with a warm greeting and genuine regard. **Diligence** reflects our belief that there is beauty in doing something well. And generosity, in spirit and in action, strengthens the whole.



In 2025, we paused with intention – to reflect, to listen, and to name more clearly who we are and who we aspire to be. This renewal of our mission, vision, and values does not replace our past; it honors it. It lays a foundation for what comes next, and it anchors us in purpose while inviting us forward with confidence, passion, and promise.

Living Our Values is more than a theme at Arbor Acres. It is a shared commitment – practiced each day in how we care for one another, how we lead, and how we serve. Rooted in faith and guided by purpose, our values shape the rhythms of daily life and the decisions that define our future. They are not abstract ideals; they are living principles – visible, tangible, and deeply felt throughout our community.

This is *The Art of Living*. It is faith expressed through service, values made visible through action, and community shaped with care. At Arbor Acres, we are living our values – together – carrying forward a 45-year legacy, while setting our sights on the possibilities ahead where aging is embraced, belonging is deepened, and life continues to be lived fully, meaningfully, and well.

“Our Guiding Principles are a Reliable Compass.”

A Message from Our President

As Arbor Acres looks toward the future, we do so with clarity, gratitude, and deep confidence in who we are.

Over the past year, our Board, leadership team, and community have taken time to reflect on how to honor the legacy that has shaped Arbor Acres while discerning how best to steward what comes next. That work has resulted in a renewed mission, vision, values, and spiritual foundation that articulate something long felt here: Arbor Acres is a place where aging is a reason to celebrate, something to be honored and lived fully.

Our mission – *to create communities that celebrate the art of living* – grounds us in our daily work of shaping lives marked by purpose, connection, and beauty. Our vision calls us forward: setting the stage to embrace aging’s possibilities with imagination and confidence. And our values – Stewardship, Trust, Excellence, Well-being, Artistry, Respect, and Diligence – guide what we do and how we do it, reminding us that the way we serve one another matters deeply.

At the heart of it all is our spiritual foundation. Rooted in our Wesleyan origins, we are called to do good things for older adults and for those who serve them. This foundation allows us to move into the future with gratitude for our past and with humility and hope for what lies ahead.

Taken together, these guiding principles serve as a reliable compass that allows Arbor Acres to move forward with clarity – to innovate thoughtfully, steward resources wisely, and strengthen the community entrusted to our care – while remaining true to the values that have defined us for generations.

As you read this report, I hope you feel these principles come to life in the stories, relationships, and moments that make Arbor Acres what it is. Thank you for being part of this remarkable community and for helping shape a future filled with promise.

With gratitude and confidence,

Andrew Applegate
PRESIDENT AND CEO



“We Embrace the Opportunities Ahead.”

A Message from Our Board Chair

As Board Chair, it is both a privilege and a responsibility to reflect on the year behind us and the values that continue to guide Arbor Acres forward. For more than four decades, Arbor Acres has stood as a trusted and enduring asset in Winston-Salem and Forsyth County – setting a standard for excellence, stewardship, and community-centered aging.

My connection to Arbor Acres is deeply personal. My grandparents chose Arbor Acres as their home, and through them, I witnessed what it means to live in a community grounded in care, respect, and belonging. Their experience affirmed what so many families have discovered here: Arbor Acres is not simply a place to live, but a place where life continues to unfold with dignity, meaning, and joy.

The theme of this year’s report – *Living Our Values* – reflects not only who we aspire to be, but who Arbor Acres has long proven itself to be. Our reputation as a leader among retirement communities in this region rests on more than longevity; it is rooted in principled governance, sound management, and a culture of accountability and care. Our financial strength provides both stability and flexibility, and it allows us to steward resources wisely while investing confidently in the future.

Equally essential is the extraordinary dedication of our Artists – the employees whose skill, compassion, and professionalism shape daily life across our campus. Together with visionary executive leadership, they ensure that Arbor Acres continues to meet the highest standards of excellence while remaining responsive to the evolving needs of those we serve.

Looking ahead, I am confident in the path before us. Arbor Acres is well positioned to build upon its legacy, pursue thoughtful growth, and remain the first choice for retirement living in our community. Guided by our values and strengthened by our people, we embrace the opportunities ahead with confidence, clarity, and purpose.

Thank you for your trust in Arbor Acres and for being part of a community that continues to live its values with intention and care. Together, we are honoring a remarkable legacy while shaping a future filled with promise.

William E. Hollan III

BOARD CHAIR



2025 in Retrospect: *Living Our Values*

In 2025, Arbor Acres lived out its commitment to Well-being and Excellence every day in caring for our residents, supporting our Artists, and strengthening the systems that sustain a vibrant and evolving community. These values drive the milestones and momentum found across our three pillars.

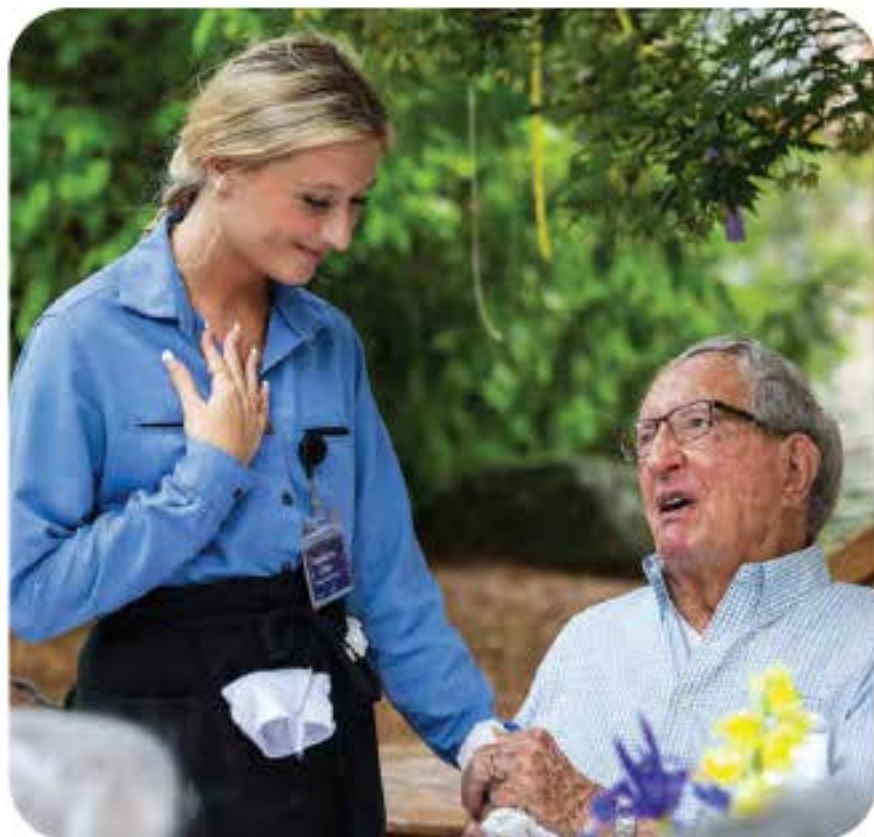


Resident Well-being

- Our licensed healthcare standards remained exemplary, highlighted by a deficiency-free NC Department of Health and Human Services recertification survey in March.
- A federal oversight survey in April resulted in only three minimal citations, and the licensed area was back in compliance the following month – an outcome the surveyor noted as unusually strong.
- Expanded access to specialty care on campus for Independent Living (IL) residents and Advantage members:
 - Mobile dermatology services launched in April.
 - Mobile audiology services launched in November.
- Stronger continuity and clarity of support for Independent Living, including:
 - GoGoGrandparent introduced as an additional transportation option.
 - Quarterly tours of licensed healthcare areas to help residents stay informed and connected.
 - New Independent Living Playbook (outlines available services, temporary healthcare stays, Perry Clinic, transportation, and more).



- Fountain Hill Home Care provided excellent service to its clients, relocated its primary office to nearby Pilgrim Court, and expanded into the broader community – all while supporting resident independence and setting records with 154 clients served and continued growth in service hours.



Artist Well-being

- 18 internal promotions in 2025 – a meaningful sign of opportunity, growth, and leadership developed from within (three highlights):
 - Matt McLaughlin → Renovation Arts Manager (after earning his General Contractor license).
 - Jeff Williams → Transportation Supervisor (from EMT/Security Officer).
 - Jasmine Machado → Asbury Place Nurse (from CNA after receiving LPN licensure).
- Qualified CNAs (Certified Nursing Assistants) advanced into newly created roles:
 - Medication Technician and Medication Aide positions established in Arborview and Asbury Place.
- Fitness Coordinator Heidi Day expanded in-house expertise in 2025, earning her 500-hour Yoga Teacher and Urban Poling Certifications. These credentials enabled a broader range of more inclusive yoga programming as well as new Urban Poling classes and an instructional workshop.
- Arbor Acres Artists were recognized statewide for excellence:
 - Kate Eagler received LeadingAge NC's 2025 Excellence in Leadership Award as Director of Fountain Hill Home Care.
 - Lily Bustos-Jaimes received LeadingAge NC's 2025 Service Excellence Award as Continuing Care Coordinator.
- Susan Koivisto retired after a remarkable 28-year career at Arbor Acres, processing payroll for hundreds of employees every two weeks with precision and care while modeling the diligence, kindness, and commitment to excellence that helped define our culture.



Arbor Acres received a "World's Best Culture" designation for the third year in a row from Culture Outcomes, based on results of the Barrett Values Assessment completed by our Artists.



Business & Operational Excellence

- Arbor Acres sustained strong organizational performance, as indicated by our 97% campus census (occupancy) and the highest net operating margin in Arbor Acres' history.
- Arbor Acres Marketing strengthened future-focused demand planning through the rollout of the Arbor Acres Ready List, which included multiple information sessions and strong early engagement.
 - We received 127 reservation requests for 30 spots, resulting in the creation of a reservation "pool."
- Facilities & Operations delivered a record year of responsiveness and stewardship:
 - 21,167 work orders completed (record year).
- Workplace safety and prevention strengthened significantly:
 - 51% reduction in workers' compensation claims compared to 2024.
 - A Root Cause Analysis Team was launched to evaluate incidents and strengthen prevention.
- Turnover has continued to decrease, and early turnover has been reduced by nearly half over the past several years.
- Dining Arts strengthened consistency and experience through improved compliance and training and refreshed menus shaped by resident feedback – alongside a year of memorable special events and celebrations.



Promoting
Artist
Leadership,
Empowerment,
Training,
Thriving &
Excellence



Mia Mack, Dining Arts

In 2025, Arbor Acres launched PALETTE, a workforce development initiative created to strengthen the well-being, growth, and long-term success of our employees, whom we proudly call Artists. Through 2025, PALETTE moved from vision to action – building an initial structure and investigating meaningful opportunities for the continued growth and recognition of Arbor Acres employees.

Program Leadership

A defining milestone in 2025 was the hiring of Rhonda Collins as PALETTE Program Manager, providing dedicated leadership to listen to teams, coordinate training, implement new programs, and build a workforce development strategy grounded in the needs of Artists across departments.

Artist Scholarships

One of the clearest expressions of PALETTE's purpose is the Artist Scholarship program – fully funded by generous donors – supporting Artists pursuing continued education and career advancement.

- Daniela Duenez Cruz (Life Enrichment, Asbury Place), UNCG; B.A. in Liberal & Interdisciplinary Studies, minor in Gerontology
- Shay Hunter (Facilities Safety Coordinator), North Carolina Central University; B.S. in Psychology (graduated December 2025)
- Tatiana Dupree (CNA, Arborview), Winston-Salem State University; B.S.N. (RN)
- Drake Tulbert (LPN, Strickland Place), Forsyth Tech; Associate Degree in Nursing

Tiffany Almoustapha, Andrea Kepple, and Amanda Harrell



Rise & Thrive

PALETTE also launched *Rise & Thrive*, a professional development program created specifically for Fountain Hill Home Care employees. *Rise & Thrive* was developed in partnership with a philanthropic resident family who deeply valued the services of Home Care and wanted to invest in the growth and success of the employees who provide that critical care.

We celebrate the first *Rise & Thrive* Scholarship Recipients:

- Marcela Gaspar
- Rehanna Morgan



Rise & Thrive

The first participants of Rise & Thrive in 2025.

Customized Training

Housekeeping and Laundry Supervisor Training:
Focused on Arbor Acres' expectations of its leaders to ensure accountability and success.

Wellness Arts Team Training:
Focused on professional skills, team alignment, and service excellence.

Artists of the Quarter

Mia Mack: Server, Dining Arts (Q4, 2025)

Tiffany Almoustapha: CNA, Nursing Arts (Q1, 2026)



Erin Perkins, Director of Dining Arts, Mia Mack, Artist of the Quarter, and Andrew Applegate, president and CEO of Arbor Acres.



Tiffany Almoustapha, Artist of the Quarter with Andrew Applegate, president and CEO of Arbor Acres

Looking Ahead to 2026...

PALETTE's momentum has set the stage for deeper investment in 2026, including the launch of the Arbor Acres Leadership Academy. A quarterly leadership development cadence will feature competency-based trainings, role-specific learning labs, the "Leading the Arbor Acres Way" course for newly hired and newly promoted managers and directors, and a dedicated Leadership Newsletter to reinforce learning and connection. PALETTE will also expand individualized coaching for new leaders and by request. PALETTE began in 2025 as a new initiative.

It is already becoming something more: a lasting expression of Arbor Acres' commitment to the people who bring *The Art of Living* to life every day.



Welcome to Our *New Residents*

We are delighted to welcome our newest residents to the Arbor Acres community. Living our values means creating a place where people are known, cared for, and welcomed with warmth. Now that you are a part of Arbor Acres, may you find comfort, connection, and a true sense of belonging. *We are so glad you're here!*



Mary Audrey and Jim Apple
Carolyn Bailey
Charlene and Bob Barham
Mary Booe
Laura Carr
Shelby and Lee Chaden
Betsy Clark
Peggy Clifford
Brenda and Bud Colvard
Lee and Dan Culp
Lucy Davis
Erika and Bill Eckel
Suzan Elster
Brenda Funderburk

Brent Moore
Jane and Redge Hanes
Robbie and Dave Irvin
Louise and Jim Kelly
Jim Lambie
Bob Lowe
Ernie Lunsford
Notie Vay Meadows
Katherine Memory
Mary Nan Moser
Mary Catherine Mowery
Anne and Will Nelson
Owen Phillips
Mary Riebe

Erika Rowe
Connie and Ray Roy
Jane and Dee Smith
Linda and Meb Turner
Evelyn and John Turner
Bill Underwood
Tricia Vaughn
Wanda Walker
Letha Ward
Elizabeth Welch
Yvonne Winters
Frankie and Vernon Winters
Kathy and Skip Zimmerman



Gratitude for Reconnection:

A Friendship Renewed After 65 Years

Arbor Acres' social media audiences celebrated an extraordinary reunion in 2025 – one of the most popular stories liked and shared! Two women – friends since their college days – found each other again after 65 years apart, proving that life has a way of bringing hearts back together.

Camille Smith of Selma, Alabama, and Nancy Dennis of Lynchburg, Virginia, first met at Salem College in the 1950s. They bonded over shared experiences and Kappa Sigma dates, and after graduation, Camille briefly lived with Nancy in Winston-Salem while preparing for marriage. Their apartment had a memorable quirk: the only entrance was up a fire escape!

Life soon carried them in different directions. Camille pursued a career first in social work and later psychotherapy, before eventually moving to Arbor Acres in 2013. Nancy's adventurous

spirit led her to Europe, where she worked in hospitals in London and Copenhagen as a medical technologist before returning to the U.S. and later settling at Arbor Acres in 2023.

A chance meeting in the on-campus Therapy Clinic erased decades in an instant. Camille approached a woman on the parallel bars and asked, "Are you Nancy Gwaltney?" Recognition was immediate, and laughter followed. "We haven't changed," Nancy said. "We still look the same to each other!"

Neither planned to return to Winston-Salem, much less reconnect. Today, they are neighbors and inseparable friends once more. Their message to others: "Value your relationships – and follow your heart."

*"Value your
relationships
and follow
your heart."*



The Arbor Acres *Endowment*

Guarding Our Legacy, Creating Our Future

There is perhaps no better metric of the lasting impact of this community and its legacy of generosity than the growth of the Arbor Acres Endowment. For decades, the Arbor Acres Endowment has been a vital source of support by ensuring that residents who enter on scholarship or those who outlive their financial resources continue to receive the care they need and thrive in the place they have come to call “home.” As the largest source of financial assistance for residents, this fund reflects Arbor Acres’ long-standing commitment to security, dignity, and peace of mind in retirement.

In 2024, the Arbor Acres Board of Directors expanded the impact of the endowment by establishing a new fund dedicated to workforce development. This fund allows Arbor Acres to invest in its Artists – the dedicated employees who provide exceptional care and service – while strengthening our ability to attract and retain top talent and ensuring the highest standards of service for residents.

As of December 31, 2025, the Arbor Acres Endowment consisted of 149 named funds with a total value of \$26,142,974. Multiple donors contributed \$395,018 to the endowment in 2025, which reflects an increase of 89% in endowment contributions compared with the average of the previous three years. According to our 4% spending policy, \$815,400 was withdrawn to support residents requiring financial assistance and to support PALETTE and workforce development efforts. The endowment is carefully overseen by the Finance Committee of the Arbor Acres Board of Directors to sustain both resident financial assistance and workforce development for generations to come.

Now, donors have the opportunity to designate their endowment gifts to support either financial assistance for residents or workforce development. We are deeply grateful to the generous individuals and families who have established named funds in both categories.

Suzy Kurtz and Kay Johnson enjoy the outdoor reception before the annual Heritage Society Dinner (left).

Nancy Pleasants applauds local singer Martha Bassett, featured entertainer for the Heritage Society Dinner (right).



Workforce Development Funds

Arbor Acres Board of Directors
Staff Development Fund
Bill and Betty Gray Davis Fund
John Raymond McCrary Fund
Rise and Thrive Fund
Strickland Workforce Development Fund
Mona and Wallace Wu Fund

Financial Assistance Funds

Eben Alexander, Jr. Fund
Welborn and Patricia Alexander Fund
R. Worth and Atha Johnson Allen Fund
Cynthia F. and Stephen G. Anderson Fund
W. Guy and Pauline C. Angell Fund
Arbor Acres Resident Council Fund
Suzanne and Leslie M. Baker, Jr. Fund
William P. and Katharine T. Baldridge Fund
Pamela H. and William L. Ball III Fund
Clyde G. and Sue F. Barber Fund
C. Marvin and Pauline K. Boggs Fund
Henry M. and Elizabeth E. Boone Fund
John B. and Elizabeth H. Brady Fund
Ruth Peters Braun Fund
James T. and Louise R. Broyhill Fund
Dorothy F. Buddine Fund
Richard W. Bunn Fund
Gertrude Gilliam Cahoon Fund
Ruth C. and Jack H. Campbell, Sr. Fund
Sam N. and Pauline H. Carter Fund
James A. Cavanaugh, Jr. Fund
Jack Allan Cheek, Sr. Fund
Reverend George B. Clemmer Fund
Catherine F. and James C. Cole Fund
Jocelyn P. and Thomas N. Connors Fund
James H. and Barbara C. Corrigan Fund
Nancy A. and J. Scott Cramer Fund
Dorothy A. and George W. Crone, Jr. Fund
Felix Gray and Lena R. Crutchfield Fund
Robert H. Cundiff Fund
George W. and Mary H. Dalton Fund
Matthew, Andrew, Hedy Danilowicz Fund
Glenn W. and Catherine J. Dobbs Fund
Lucy Gray Smither and Harvey Drake Fund
Charles H. and Carolyn G. Duckett Fund
Lynn B. and Barry A. Eisenberg Fund
R. Harold and Aleta Griffin Ellison Fund
Paul W. and Mary M. Emler Fund
William H. Entwistle, Jr. Fund

Ann Austin Flynt Fund
Steve and Sandy Forrest Fund
Robert J. and Marjorie H. Froeber Fund
John Edward and Jane Keiger Gehring Fund
Bishop W. Kenneth and
Martha O. Goodson Fund
I. Bryce and Izoria S. Gordon Fund
William D. and Emma B. Graham Fund
Faye C. Griffin Fund
Wanda W. Hackbarth Fund
James G. and Helen C. Hanes Fund
Philip and Elizabeth Hedrick Fund
Mary Edna and Jefferson B. Helms, Jr. Fund
Charles W. and Jean L. Hole Fund
Allan C. Hollan Fund
Glenn H. Hollingsworth Fund
James E., Jr., and Betty J. Holmes Fund
Ralph H. and Cynthia D. Holthouser Fund
Cynthia P. Hopkins Fund
Fred S. and Ruth L. Ingram Fund
Katharine K. and John Gick Johnson Fund
Ruby P. Johnston Fund
Glenn Adkins Jones Fund
Reverend Daniel P. Jones Fund
Elizabeth Bynum Kapp Fund
David L. Kelly, Jr. Fund
Truman T. and Hilda C. Kiger Fund
Ruth I. and Emil Kohut Fund
Kurtz Family Foundation Fund
Julian and Elizabeth G. Lake Fund
Hattie B. Lakey Fund
Frederic H. Lassiter Fund
Mary Louis H. Leith Fund
Susan R. Leonard Fund
E. Carwile and Garnett H. Leroy Fund
Joyce Levine Fund
David W. and Elizabeth C. Lewis Fund
Ralph E. and Lois L. Logan Fund
Gwen Lentz (Mrs. Clyde A.) Long Fund
Harold R. and Helen S. Longfellow Fund
Peggy B. and John M. McCoy Memorial Fund
Margaret Ione McIntyre Fund
William H. and Georgia M. Millett Fund
Mary, Burt, and Tom Miskimen Fund
J. Frank and Mary S. Mock Fund
Walter M. Moore, Jr. Fund
Gwen S. Morris Fund
Robert S. Northington, Sr. Fund
Dorothy B. Peacock Fund
L. Gordon and June D. Pfefferkorn Fund
William E. and Flossie B. Phibbs Fund
W. David Piner Fund
Leroy, Kathryn, and Angela Pittman Fund
Nancy W. and C. Edward Pleasants, Jr. Fund
Ruth M. and Clifton E. Pleasants Fund

Richard B. and Nancy B. Port Fund
Frank R. and Sara Griffith Rayburn Fund
George P. Robinson Fund
Shirley Marie Rogers Fund
Harry D. Sasher Fund
Phoebe Barnhardt and
William Madison Satterwhite, Jr. Fund
Herbert C. and Virginia J. Schafer Fund
Eloise Sparger Siceloff Fund
James Conrad Siceloff, Jr. Fund
Jerry and Marge Silber Fund
William S., Jr., and Dorothy C. Smith Fund
Harry R. and Verna L. Sorensen Fund
Frederick P. and Gerrii S. Spach Fund
Jule C. and Nancy C. Spach Fund
Ann Lewallen Spencer Fund
Aldonia W. Spivey Fund
Sarah White and William
David Stedman Fund
Jean Aleen Steelman Fund
Norman V., Jr., and Frances K. Stockton Fund
Peggy W. and Ralph M. Stockton, Jr. Fund
Thomas B. and Jean S. Stockton Fund
Elizabeth M. and Robert L. Strickland Fund
George E. and Phyllis M. Stubbins Fund
W. Mills and Margaret P. Taylor Fund
Jessie C. Temple Fund
Ella Joyner Brame and
Lawrence R. Toburen Fund
B. Todd Troost Fund
Jane W. Truscott Fund
Norma S. Turnham/Zeno C. Sink Fund
Harry and Nancy Underwood Fund
Carolyn H. and Robert C. Vaughn, Jr. Fund
Charles Byrd Wade, Jr., and
Margaret P. Wade Fund
Louise Yarbrough Wagoner Fund
Reverend and Mrs. R. Gilmer Wagoner Fund
Spencer Cobb and Nell Kerns Waggoner Fund
Susan B. Wall Fund
Leslie R. and Robert E. Warhover Fund
Evelyn S. Watlington Fund
Janie Davenport Weaver Fund
Elizabeth Welch Fund
Sue and Ed Welch Fund
William G. White, Jr. Fund
Doris P. and James O. Whitt Fund
Ronald and Margaret Wilkinson Fund
William F. and Jane G. Womble Fund
Donald M. and Dawn B. Wooten Fund
Thorne Hartle Worley, James Edgar Gay III,
and Hal Grayson Worley Fund
W. Vann and Ann York Fund
Ophelia I. and Samuel J. Zachary Fund

The Arbor Acres Endowment has been a vital source of support!



Charter members John Gehring (top) and Mary Underwood (bottom) enjoy the special Anniversary Society Dinner.

The *Anniversary Society*

The Anniversary Society is Arbor Acres' premier donor society, recognizing those who have generously committed \$500,000 or more to The Arbor Acres Endowment through their charitable plans, either during their lifetime or through their estates.

Members of The Anniversary Society:

Joanna and Wesley Bailey
Jane and John Gehring
Anne Kerr Walker and Lindsay Holcomb
Susan Leonard
Angela Pittman
Kathryn Pittman
Gail Troost
Mary Underwood

We remember charter member Coy Carpenter, who passed away in 2025, and we give thanks for the enduring legacy of his generosity.



Cheers, Arbor Acres!

A Personal Note from Angela Pittman

After five of the most meaningful years of my life, I celebrate the memories I share with my sweet mom, Kathryn, and my extended family residents and staff. I enjoy serving on the Resident Council and Croquet Committee, sharing my travels and photos, playing croquet, loving Sharps' Flats' concerts and appreciating our many events and opportunities. I'm also thankful to have on-site physical therapists to help me heal after my total shoulder replacement.

Because I live in this extraordinary community, I desire to give back. During my first year, I joined the Heritage Society, and I now contribute annually to my family endowment fund. In 2025, I established a donor-advised fund and became a member of the Anniversary Society by including Arbor Acres in my charitable estate plan. Through these commitments, I can provide financial assistance to selected projects and to residents who need additional resources now and after I'm gone.

Thank you Arbor Acres for enriching my life by offering me art, beauty, entertainment, education and security. I'm grateful to live here and look forward to future years of joy and contentment. I adore glitter, sequins and sparkles. You also shine brightly and continue to teach me "The Art of Living."

Love you Arbor Acres!
Angela Pittman



The *Heritage Society*

The Heritage Society was established by the Arbor Acres Board of Directors in 1992 to honor those who have made a lasting commitment to the future of Arbor Acres through philanthropy. As of December 31, 2025, the Society included 135 individuals, including 12 new members added in 2025, who have demonstrated their dedication by contributing to the Arbor Acres endowment through one of three ways: the creation of a Named Endowment Fund with \$25,000 or more, a planned gift of \$25,000 or more, or lifetime giving of \$100,000 or more.



Anonymous (2)
Jane and John Albright
Welborn Alexander
Ross Allen
Cynthia Anderson
Suzie Anderson
Joanna and Wesley Bailey
Zanne and Bud Baker
Kay Baldridge
Jennifer Baldwin
Pam and Bill Ball
Libby and Penny Booke
Wilba Brady
Louise Broyhill
Jim Bunn
Peggy Burgess
Nancy and Tom Cannon
Nell Cavanaugh
Winborne and Chan Chandler
Becky and Bill Clingman
Jocelyn and Tom Connors
Phyllis Cooke
Pat Crews
Betty Gray and Bill Davis
Luci and Dek Driscoll
Carolyn Duckett
Amy and Robert Egleston
Lynn and Barry Eisenberg
Marian English
Claudia and Gary Fleming
Sandy and Steve Forrest
Nella Fulton
Jane and John Gehring
Cinny Graham
Connie and Lyons Gray
Faye Griffin
Anne Haxton
Millie Heine
Jeff Helms
Anne Kerr Walker and
Lindsay Holcomb
Jean Hole
Cindy and Ralph Holthouser

Cindy Hopkins
Charlotte Hubbard
Vicki and Tom Hunt
Ginny and Gregory Hunter
Pat and John Hunter
Kay Johnson
Dan Jones
Mary Jane Keith
David Kelly
Hilda Kiger
Martha Kirby
Edie Knott
Suzy and Arthur Kurtz
Katty and Hamp Lefler
Mary Lois Leith
Susan Leonard
Dee LeRoy
Nancy Lide
Joe Logan
Joyce Long
Mary Allen and Jim Martin
Carroll McCullough
Mary Martha and
Philip McKinley
Cama Merritt
Walt Moore
David Muir
Ellis Pardue
Joellen Parks
Angela Pittman
Kathryn Pittman
Nancy and Ed Pleasants
Frank Rayburn
Ronda Rich
Wynn Tanner and
Mike Robinson
Betty and Bill Sayers
Sandy and Charlie Scott
Marge Silber
Camille Smith
Gerrii and Peck Spach
Chris Stockton
Dick Stockton

Phyllis and Eddie Stubbins
Gwen Toburen
Lynn and Greg Totterdale
Gail Troost
Bob Turner
Mary Underwood
Nancy and Harry Underwood
Tricia Vaughn
Frances Vazquez
Tom Williamson
Dawn Wooten
Thornie Worley
Mona and Wally Wu
Becky and Frank Wyatt
Ann York

*We remember with great
fondness members who
passed away in 2025:*

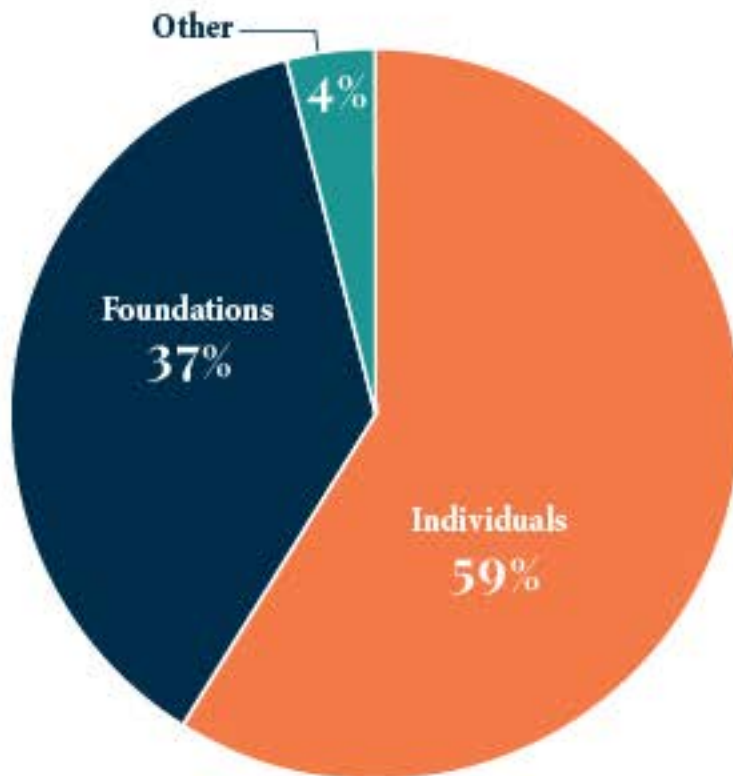
John Brady
Coy Carpenter
Jim Cole
Jerry Cooke
Joy Levine
Doris Whitt
Lucy Willingham



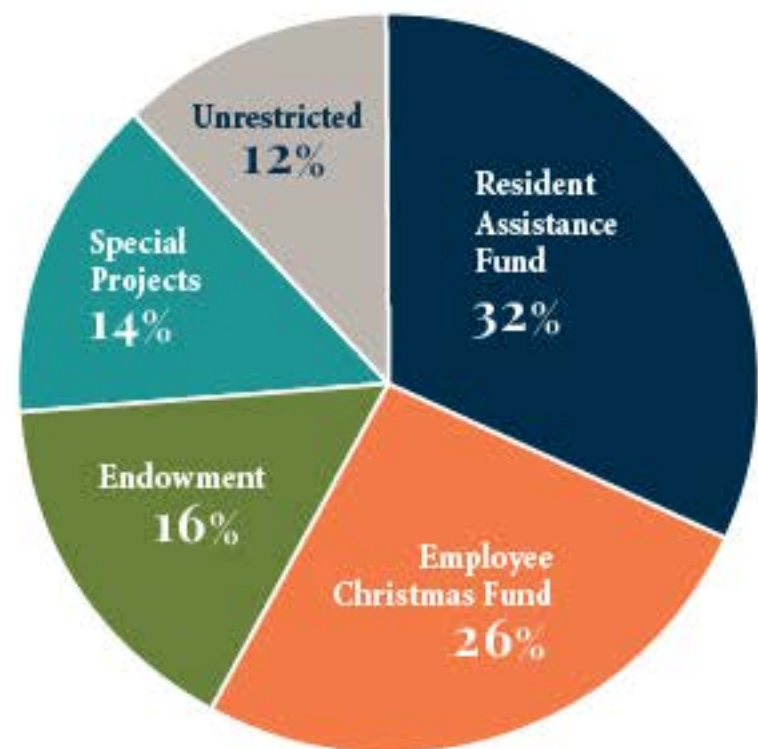
The Art of Giving

Philanthropy is one of the pillars of a thriving, compassionate community at Arbor Acres. In 2025, our donors contributed over **\$2.4 million**, ensuring that residents and employees alike continue to flourish. The charts below illustrate both the sources of these generous gifts and how they were designated to support endowment, resident assistance, holiday gifts for employees, special projects, and unrestricted needs. Every gift – large or small – strengthens our mission and enriches the lives of those who call Arbor Acres home.

Funding Sources



Gift Designations



A Special Thank You to our donors!

- Because of your generosity, **total contributions in 2025 were up 25%** compared with the average of the previous three years.
- Even more meaningful: **63% of all residents were donors** – a steady rise over the past four years (52% in 2022 → 57% in 2023 → 61% in 2024 → 63% in 2025).
- We welcomed **12 new Heritage Society members** (now 135) and **3 new Anniversary Society members** (now 11).
- Residents documented **16 new planned gifts**, bringing the total to **47 planned gifts** totaling over **\$3.8 million**.
- **Qualified Charitable Distributions (QCDs)** from Individual Retirement Accounts (IRAs) increased to **77 gifts**, and the total QCD amount rose to **\$393,839** (up from \$206,759 in 2024).

Ensuring a Legacy of Care and Community

Every gift to Arbor Acres helps sustain a caring environment where residents are supported, employees are valued, and community life is vibrant – today and for generations to come. Whether through annual contributions or a planned gift in your will or estate, your generosity leaves a lasting impact. By including Arbor Acres in your

charitable plans, you become part of our story and help ensure that our mission of compassionate care and purposeful living continues far into the future. To learn more about ways to support Arbor Acres, please contact **Jonathan Halsey**, Senior Director of Philanthropic Arts, at 336-464-1923 or jhalsey@arboracres.org.

Generous Giving in 2025

ARBOR ACRES IS GRATEFUL to the following donors for their generosity. This list recognizes donors who made gifts between January 1, 2025 and December 31, 2025. We have taken great care to ensure its accuracy. If you notice any errors or omissions, please contact Wendy Cason at 336-748-4636 or wcason@arboracres.org.

**Indicates Deceased as of March 5, 2026*

Anonymous (10)
Nancy and Rhett Abercrombie
Melinda Adams
Virginia Affeldt
LaTanya Afolayan
Jane and John Albright
Welborn Alexander
Lorrie and Tommy Allen
Margie Allen
Ross Allen
William Allen
Mary Alley
Winnie Allred
Suzie Anderson
Scharlot Angel
Teeny and John Anthony
Hannah and John Appel
Mary Audrey and Jim Apple
Lisa and Andrew Applegate
Arbor Acres Phoebe's Gift Shop
Arbor Acres Village Gift Shop
Prissy Armfield
Susan and Paul Armstrong
Patsy and Steve Ashworth
Phyllis Avant
Sharon Bachman
The Bachmann Strauss Family Fund
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Joanna and Wesley Bailey
Kathy and Don Bailey
Zanne and Bud Baker
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Jennifer Baldwin
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Gloria Banks
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Charlene and Bob Barham

Sondra and Ralph Barnes
Deborah and Richard Barreau
Suzanne Barrows
Nathan Battle
Cecilia Baute
Louise and Bill Bazemore
Anne Bell
Betty Bell
Janie and Andy Bell
Ran and Frank Bell
Barbara Benson
James Berrier
Linda and Lee Bettis
Lillie Bishop
Carolyn Black
Cheryl and Walt Blackman
Cynthia Blair
Elizabeth and Stephen Blair
Kristie and Jonathan Blanco
Debbie and Tyler Blethen
Ann and James Blount
Gale and Jerry Blue
Mary Booe
Libby and Penny Booke
Lori Anne Bowen
Rose Ellen and Ted Bowen
Lee Bradway
Wilba Brady
John Brady*
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Lisa Bynum
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Helen Caines
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Bobby Campbell

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Coy Carpenter*
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Doris Clark
Ellie Clayton
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Anne and Joe Coltrane
Brenda and Bud Colvard
Jocelyn and Tom Connors
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Molly Cook
Priscilla Cook
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Jean Cooper
Kate and Tim Cooper
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Betty and Leon Coward
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Pat Crews





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Nancy Culp
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Sylvia Eaglin
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Doyle Early
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Nan Fleming
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Bobbi Forster
Denny Franklin
Janet and Gene Frekko
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Jonathan Halsey
Charmain Hamer
Frances Hammersla
Steve Hammond
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Hedy Hedrick
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Eileen and Murray Hewell
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High Meadows Golf & Country Club
Frank Hill
Ruth Hill
Marylyn Hilton
Tammy Hinkle
Gail Lybrook and David Hobbs
Jack Hobert
Kyle Hoffman
Doris Hohman*



Lettuce Celebrate!

The Arbor Acres Micro-Farm sprouted in the Asbury Place Alibi Café thanks to generous donors!

This indoor garden has been growing pesticide-free leafy greens, herbs, microgreens, and edible flowers for campus-wide dining – and it's all kept on track with a special app that manages growing schedules like clockwork!

Each week, amazing Asbury Place residents help dining staff harvest garden delights. Often, crisp lettuce will star in resident and staff salads while fragrant oregano will add flavor to special dishes in the Arbor Room.

Here's to another year of growing sustainable goodness and flavor to nourish our community!



Generous Giving *continued*

Anne Kerr Walker and Lindsay Holcomb
 Jean Hole
 Elizabeth and Bill Hollan
 JoBeth and Robert Holliday
 Dalton Holmes
 Margaret Holmes
 Martha Honaker
 Cindy Hopkins
 Stuart and Linda Horsley
 Marion and Gary Hosey
 Deb Howard
 Stuart Howards
 Vicki Howie
 Lynn Howland
 Molly and Buck Hoyle
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 Evelyn Hughes
 James Hunt
 Vicki and Tom Hunt
 Jerry Hunter
 Pat and John Hunter
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 Theresa and Nelson Ingram
 Martha and Phil Isenberg
 Vicki and Duke Ison
 Dean and Frank Jackson
 Gustav Jamison
 Peggy and Peter Jenks
 Betty Jeter
 Ann Johnson
 Kay Johnson
 Anne and Robert Jones

Cynthia Jones
 Dan Jones
 Elaine Jones
 Jane and Gordon Jones
 Dyeann and Henry Jordan
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 Deb and Ronald Keaton
 Susan and Alan Keely
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 Mary Jane Keith
 Rosemary Keller
 David Kelly
 Elizabeth and Bill Kelly
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 Mary and Hayden Kepley
 Andrea Kepple
 Jerrie Kessenich
 Har Simran and Manjit Khalsa
 Sylvia* and Joe Kiker
 Georgia and Dick Kimball
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 Joellen Parks
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 Mary and Cal Ratcliff
 Frank Rayburn
 Judy Reeder
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 Harriette Renegar
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 Michelle Reott
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 Betty Richardson
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 Gary Rousseau
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 Jo Ruckdashel
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 Leslie Sandbulte
 Eleonor Sandresky
 Wallace Saunders
 Betty and Bill Sayers
 Martha Scherer
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 Noelle and Rob Schofield
 Patricia Schultz
 Rebecca and Robert Schwartz
 Susan and Jerry Schwartz
 Barbara Scott
 Sandy and Charlie Scott
 Caryn Sears
 Joan and Dane Sebastian
 Robert Sevier
 Sharon and Ron Shealy
 Anna and Tom Shearon

Generous Giving *continued*

Sheila and Craig Sheppard
Howard Shields
Sally and Ricky Shore
Janet Shroyer
Barbara Sifford
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Beckie and Andy Smith
Camille Smith
E. Sue Smith
Jane and Dee Smith
Jim Smith
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Mary Sue Smith
Michael Smith
Molly Smith
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Michael Spangler
Sue and Ray Spangler
Randall Sparger
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Dick Stockton
Wendy Stockton
Betty Ann and Joseph Stone
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The Strickland Family Foundation
Jane Stringer
Phyllis and Eddie Stubbins
Jane Sullivan
Buck Summerson
Cliff Summey
Sandy and Bill Sumner
Stella Surratt
Camille Suttle

Nathalie Lavigne and Vance Suttle
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Kay Tabor
Graham Talbott
Robin and Thomas Taylor
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Ann and John Timmons
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Gail Troost
John Trulove
Elizabeth Truscott
Larry Tucker
Alex Turner
Bob Turner*
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John Turner
Linda and Meb Turner
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Mary Underwood
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Sun Choi and David Walker
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Emily Ward
Letha Ward
Nancy Watkins*
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Zena and James Yarbrough
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Anita Henderson and Bill Young
Laura Young
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Kathy and Skip Zimmerman
Suzanne and Robert Zonneveld



Grandfriends:

Sparkling Students' Love for Reading

Residents John Dial, Don Eppert, and Gordon Jones are volunteers with "Reading Warriors" at Kimberley Park Elementary School in Winston-Salem, a Love Literacy initiative that offers tutoring and mentorship to kindergarteners, first graders, and second graders who struggle with reading.

At the beginning of the current school year, volunteers are each assigned a first grader who is performing at or below marginal levels. John, Don, and Gordon meet twice a week with their students, building relationships and helping increase their reading proficiency.

"It may surprise many that in Forsyth County, less than 50% of third grade students read at the expected level," says Don. "The 'Reading Warriors' curriculum relies on phonetics, one of the most effective ways to teach reading skills to younger students in a progressive way."

Each week, the tutors prepare for their two weekly 30-minute lessons using flash cards, story books, and other prompts outlined in the program manual. They are then required to

write a report following each session to provide feedback and measure progress. All the students have to do is show up – by design, they are not given any assignments to work on at home.

It didn't take John, Don, and Gordon long to realize that, as the teachers, they are the ones who do all the homework! But it is worth it.

"I've tutored in reading before," says Gordon. "It's a good way to help students build their reading skills and make them feel good about themselves."

Don adds, "There is nothing more soul-filling than helping a young person read and watching them grow and develop confidence. I look to working with my student every week."

John speaks for all of them. "I wanted to do something for our community, and this is something I can do. I've gotten more from the program than the students, because of how rewarding it's been to see the students learn, improve skills and develop relationships with their tutors."



In *Memoriam*

We honor and remember those who left us in 2025 – friends, neighbors, and loved ones, each of whom were unique and precious members of our community. Their presence enriched Arbor Acres, and their kindness, wisdom, and friendship remain in our hearts. As we cherish their memory, may we find comfort in the lasting impact they have made and the love they shared.

.....

Marion Lewis Avera
The Rev. Dr. Douglass Moxley Bailey III
Charles Bame
John Blake Brady
Coy Cornelius Carpenter, Jr.
Henry Wayne Church
Patricia Shore Clark
Beverly Jane Coker
James "Jim" Coffman Cole
Jerry Monroe Cooke
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Dr. Guy Nelson Copeland, Jr.
Leila Caroline Sikes Cowan
Connie B. Delaplane
Betty Eubank Early
Marilyn Eason
James H. Francis
Harold Eugene Frye
Susan "Snooze" Stephenson Gates
William "Bill" Thomas Graham
Paul Perkins Gwyn, Jr., M.D.

Darwin "Pat" Ray Hartsfield
Richard Vaughn Hayes
Doris Martin Hohman
Peggy Joyce Honeycutt
Molly Weeks Johnson
Dale Robert Keen
Mary Rode Kerr
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Mildred Forrester Kolb
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Duran Greene McDonald
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Mary Louise Morgan
Otto William Mueller
Michael Thomas Munley
Martha Ann Williams Murray
Joel Henry Pasternak

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The Rev. Dr. David Wayne Riffe
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Vera Saline Robinson
John Orland Rundell
Wilbur Gene Sandbulte
Nancy Smith
Joseph "Joe" William Stanfield, Jr.
William "Bill" Allen Suttle
Virginia "Ginny" O. Torrance
Eleanor Micheaux James Vance
Oliver "Bud" Antietam Verner, Jr.
Nancy S. Watkins
David Stathem Weaver
Arthur Gerard Weber
Susanne "Dannie" Soenksen Weber
Betty Jo "BJ" Whiteheart
Doris Pruett Whitt
Lucy James Willingham
Margaret "Peggy" Mary Seli Zohorsky



Residents volunteer with Habitat for Humanity to build the second home funded as part of the three-year commitment.



Resident Don Ruge and Artist Sheana Grady (Dining Arts) at 2025's St. Patrick's Day Dinner.



Artist Lisa Maness (Wellness Arts) and Resident Millie Heine pose for a selfie at the May Day Celebration.

Our Generous Community: *A Legacy of Giving and Impact*

Generosity and community support are integral fibers woven into the fabric of Arbor Acres. Since 1980, more than \$40 million has supported residents who could not otherwise afford to live and thrive in our vibrant community.

Arbor Acres has also made a remarkable difference beyond the borders of our campus. In 2023, this community took on its most ambitious project yet: a commitment to Habitat for Humanity to fund three homes for families over the course of three years. The first step of this bold endeavor was the Resident Fundraiser Campaign, which raised an astounding \$103,715 that was awarded in the winter of 2024.

In 2025, the Community Investment Task Force, a subcommittee of the Board of Directors, recommended \$325,000 in contributions to local nonprofit organizations, including:

- **\$100,000 to Habitat for Humanity of Forsyth County** to construct a new home as part of the three-year commitment
- **\$100,000 to The Shepherd's Center of Greater Winston-Salem** for minor home repairs for older adults
- **\$75,000 to The Salvation Army of Winston-Salem** for the Center of Hope emergency family shelter
- **\$25,000 to Financial Pathways of the Piedmont** for the Senior Financial Care program
- **\$25,000 to Second Harvest Food Bank of Northwestern NC** for underserved populations

This strong culture of giving also extends to our Artists, our cherished and valuable employees. Through the annual Employee Christmas Fund Campaign, residents came together to express their gratitude, raising over \$600,000 to support our hardworking staff.

Arbor Acres is proud of its longstanding culture of philanthropy. The spirit of these efforts ensures we continue to meet our charitable commitments while making a profound difference in the lives of others.

Grateful for a Prosperous Year:

A Message from Our Chief Financial Officer

It is my privilege to share with you that 2025 was one of the most financially prosperous years in Arbor Acres' 45-year history. Through careful stewardship and the continued trust placed in us by our residents and families, the organization achieved a Net Operating Margin of nearly 9%, surpassing our expected 4% and exceeding prior highs experienced before the pandemic.

Approximately three-quarters of this positive variance was attributable to higher-than-anticipated census across all levels of care. We experienced exceptional demand through direct admissions to Assisted Living, along with record occupancy in Memory Care and Skilled Nursing. The remaining improvement was driven by disciplined expense management, including stronger-than-expected performance in several departments, most notably lower dining expenses in our licensed areas. This outcome reflects both operational excellence and diligent oversight throughout the organization.

Our investment portfolio delivered strong results in 2025, with returns of approximately 13% for the year. The strength of our General Fund investments – representing Arbor Acres' general reserves – continues to position us favorably with our accreditor, CARE, and with Fitch Ratings. These strong evaluations translate into lower borrowing costs when capital projects require financing. Healthy reserve balances also signal to oversight organizations, including the North Carolina Department of Insurance, that Arbor Acres remains financially secure and well managed.

The year's investment performance also meaningfully strengthened our Endowment Funds, the majority of which support our Financial Assistance program. This program enables residents who exhaust their financial resources, through no fault of their own, to remain part of our community. The Endowment is now producing record levels of annual support, and the growth experienced in 2025 will allow that support to continue expanding in the years ahead.

In 2025, we made a significant investment in our future through the campus-wide transition to PointClickCare, the first major change to our primary resident care and billing platform in more than a decade. Our staff successfully navigated the months-long transition with care and diligence. This new software will enhance our clinical teams' ability to care for and interact with residents, strengthening both service delivery and operational efficiency.

As we reflect on 2025, I am grateful for the collective effort that made these results possible. Our financial strength is not an end in itself – it is a foundation that allows us to fulfill our mission with confidence, compassion, and long-term stability. Thank you for the trust you place in Arbor Acres. We remain committed to honoring that trust in the years ahead.

David W. Matthews
VICE PRESIDENT OF
FINANCIAL SERVICES/CFO





ARBOR ACRES

We celebrate our individuality and unique talents.

ARBOR ACRES

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