

Annual Report

JULY 2017 - JUNE 2018



Our Community. Our Seniors. Our Commitment.

Meals on Wheels of Wake County 2017/2018 Board of Directors

Officers:

Manju Karkare, *President*
Tom Cogswell, *Treasurer*
Jim Allaire, *Secretary*
Jim Kellenberger, *Past President*

Directors:

Judi Adams	Sue Haberberger
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Thomas Fagley	Skip Williams
Dan Freeland	Catherine Wood
Andy Grimm	

Staff

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Morgan Arnold, *Outreach Specialist*
Sally Haile, *Outreach Specialist*
Lesley Richmond, *Assistant Director of Program Services, Home Delivery*
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Alex Vaughn, *Date Entry Specialist*
Jacqueline Gray, *Accounting Assistant*
Lesley Castle, *Development Associate*
Brenda Johnson, *Senior Site Coordinator*
William Cole, *Driver*
Chava Joyner, *Driver*

Site Managers

Five Points Center for Active Adults: Faith Walters
St. Saviour's Outreach Center: Lottie Morgan
Garner Senior Center: Pat Rooks
Northern Wake Senior Center: Jessica Holman
Morrisville: Esther Dunnigan
East Wake Senior Center: Ellen White
Pine Acres: Debbie Wickmann & Maggie Thompson
Redeeming Love: Eloise Best

Site Coordinators

Apex: Julie Roe
North Raleigh: Katie Turkal
Garner: Febbie Gordon
Wendell: Elizabeth Wiggins
Rolesville: Lesley Richmond
Zebulon: Cindy Privette
Knightdale: Pam Hooks
Cary: Dubba Lucas

All of us who support Meals on Wheels know that we deliver more than a meal. We combine public and private support with volunteer and staff efforts to make a real difference in our participants' lives. It begins with preparing a hot, delicious and nutritious lunch that is ready to eat when our volunteers deliver. It extends to the personal visit and the social connectivity as well as the safety check. It results in better nutrition and improved health outcomes.

Delivering the hot lunch is the defining characteristic of our Meals on Wheels program. We recently commemorated delivering our 9 millionth meal. Our dedicated volunteers faithfully assemble daily to make certain that our senior neighbors can partake in a balanced and nutritious lunch. As a part of our March for Meals campaign, we had many public officials—including the North Carolina Secretary of Health and Human Services Dr. Mandy Cohen-- deliver lunches. The Coastal Federal Credit Union chose Meals on Wheels for its Power of Sharing Award in May. The community recognizes the important service we provide to fight food insecurity in our community.

Because of public funding and the generous support of this community, most participants enjoy this service without any cost. We celebrated our most successful signature fundraiser at our 17th Mardi Gras Ball on February 9th. Our many corporate partners include Goodberry's Frozen Custard, which backed an innovative online fundraising campaign this spring.

We continue to demonstrate the benefits of the Meals on Wheels program and expand our network in the community. Health care providers and health care payers are recognizing nutrition as one of the key social determinants of health that impact health outcomes. Meals on Wheels of Wake is also one of three pilot programs in the country to work with Aetna to introduce a Care Coordination service for their patients.

In the future, as in this past year, Meals on Wheels will continue to deliver more than a meal as an integral part of our mission.

As the President for the Board of Directors for the year which just concluded, I am pleased to present the Annual Report that records our efforts.

Manju Karkare, President
Meals on Wheels of Wake County Board of Directors



Manju Karkare, President 2017-2018

Meals on Wheels of Wake County Board of Directors

Financial Statement - Ending June 30, 2018

Support

Government Grants	\$33,700
Gifts and Contributions	\$1,189,933
United Way allocations and designations	\$25,406
Donated Facilities	\$50,098

Total Support \$1,299,137

Revenue

Third party reimbursements	\$1,450,001
Meal sales and program income	\$115,594
Fundraising events	\$77,405
Investment and other income	\$8,009

Total Revenue \$1,651,009

Program Services

Home delivery	\$664,994
Title III-Congregate	\$618,298
Title III-Home Delivery	\$1,285,686

Total Program Services \$2,568,978

Supporting Services

Administrative	\$124,896
Fundraising	\$141,782

Total Supporting Services \$275,027

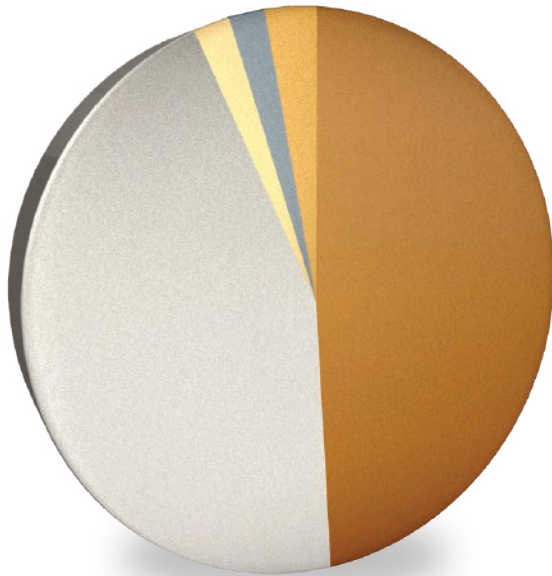
TOTAL SUPPORT & REVENUE \$2,950,146

TOTAL EXPENSES \$2,835,656

Increase in Unrestricted Net Assets \$114,490

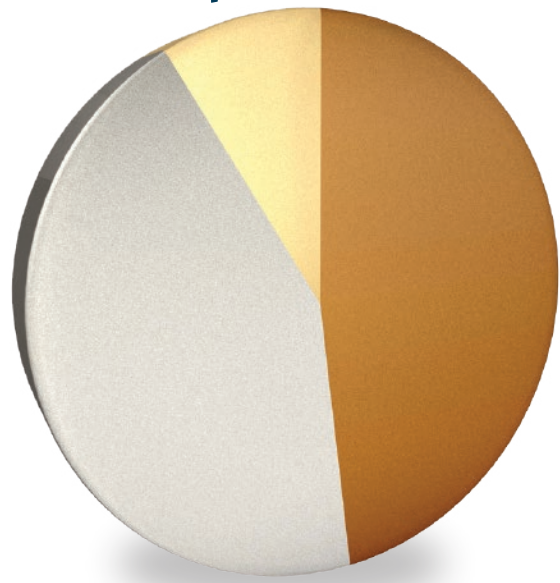
These totals are unaudited. An audited statement will be available after November 15, 2018.

Sources of Revenue



- Title III - 49%
- Fundraising - 44%
- United Way - 1%
- Other Public - 2%
- Other - 4%

Expenditures



- Food - 49%
- Program Expenses - 42%
- Administration - 9%



of meals served
329,028



of clients served
2,594



of miles driven by volunteers
225,000 miles
for \$122,625



of meals served since 1974
9,139,128



of volunteer hours
33,750 hours
for \$833,288



of clients 100+ years old
9

- **97% of our clients reported that Meals on Wheels helps them to feel better due to regular, nutritious meals**
- **97% reported that they feel more secure at home due to the daily visit**
- **100% reported in that the Meals on Wheels delivery means that they can continue to live at home**

1974 Circle \$10,000.00 and over

Bank of America
Clay Foundation East
Genworth Foundation
IBM Employee Charitable
Contribution Campaign
Lutheran Services Carolinas
Nancy A. Wright Foundation
PEM Family Fund of the Triangle
Community Foundation
NC State Employees Combined
Campaign
The Stewards Fund
Wal-Mart Foundation
Jenny Wright
YourCause, LLC
Dorothy W. Zurek

Neighbors Circle \$5,000 - \$9,999

Bright Funds Foundation
Capital Bank
Richard S. and Nancy Cavallaro
Schwab Charitable Fund
Coastal Credit Union Foundation
Concord Hospitality Enterprises
Deniz and Bulent Ender Fund
of the Triangle Community
Foundation
First United Methodist
Church of Cary
Goodberry's Creamery
Andrew R. and Sara Grimm
Hayes Barton United Methodist
Church
Nancy McFarlane
Meals on Wheels America
Linda and Joe Mims
Lou and Joy Moshakos
Godofredo T. and Anita Ng
Stephanie Norris
William D. Smith
The LWH Family Foundation
The Seby B. Jones Family
Foundation, Inc.
Wells Fargo Foundation
William L. Williams

Wake County Circle \$2,500 - \$4,999

A. E. Finley Foundation, Inc.
Atlantic Investment Management
Blue Cross Blue Shield NC
Foundation
Benevity Causes
Christ Episcopal Church
Christopher and Julia Cox
Gregory J. & Susan Fischer Dobbyn
Duke Energy Foundation
First Presbyterian Church of Raleigh
Food Lion FEEDS Charitable
Foundation
Michael A. and Diane Fournel
Good Shepherd Lutheran Church
Elizabeth Graff
Susan Haberberger

Fred and Mary Haggard
Hayes Barton United
Methodist Church
Hogan Family Foundation
Ted and Teresa Kazaglis
James W. and Leslie Kellenberger*
Jayant S. Khadilkar and Manju
Karkare*
Koinonia Foundation
Anand Lagoo and Sandhya
Lagoo-Deenadayalan
Linda J. Leith
Patrick and Caroline Mackie
Miller Family Foundation of Wake
County
National Christian Foundation
Nivison Family Foundation
North Raleigh United
Methodist Church
Our Savior Lutheran Church
PhRMA
Poyner & Spruill LLP
Raleigh Housing Authority
Resurrection Lutheran Church
Jonathan T. and Kayla J.
Stewart Fund of the Triangle
Community Foundation
The Curtis Foundation
UNC Rex HealthCare
US Foods
Wake Chapel Christian Church
White Memorial Presbyterian
Church
William C. Ethridge Foundation Inc
Elizabeth M. Williams
Jason and Stephanie Ziegler

Blair Drive Circle \$1,000 - \$2,499

Judith D. Adams,
AMT Group
James and Michelle Allaire
AP Designs, LLC
Thomas and Camille Arrington
Atlantic Tire & Service
Vijaya Bapat
Dustin Baskett
George F. Bason
Vincent and Ailene Beese Fund
of Fidelity Charitable
Allan Bloom*
Blue Cross and Blue Shield
of North Carolina
Virginia and Daniel Boyle*
Lisa B. and John L. Bradley, Jr.
Renee and Derek Bunton
Heather and Chris Burkhardt
Josephine C. Burnett
Woodson and Susan King Byrd*
ca Technologies, Inc.
Leonidas Capetanos
Capital Community Foundation, Inc.
J. David and Carol A. Carlson
Nancy M. Carter*
Suzanne and Fletcher Carver
Cary Central Rotary Club
Cary Presbyterian Church
Centrex Properties, Inc.

Richard and Suzanne Chandler
April and Beryl Childers, Jr.
Robert and Lois Clements*
Joan K. Coley*
Martha R. Cooper
Carlyle C. and Ruth Craven
Harris and Susan Cummings
Cunningham Financial
Frank A. Daniels, Jr.
DLJH Charitable Foundation
Phyllis Donohue
Edenton Street United
Methodist Women
Thomas and Jenny Fagley*
Olalekan Folarin and
Feyisayo Adeyina*
Fonville Morisey & Barefoot
Katherine S. Foresta*
Foundation for Do
Foundry Commercial
William E. Fox III
Fuquay Varina United
Methodist Church
M. Elizabeth Gant
Ambrosia Garcia*
Lyle D. and Rhonda Gardner
Marcia A. Gibbs
Glover Construction Co., Inc.
Chad Goins
Jeffrey and Mary Christine Gredvig
Schwab Charitable Fund
Greystone Baptist Church
Patricia and Rodney Grindle Fund
of Fidelity Charitable
Bethany C. Hagan
David and Corina Hansquine
Virginia and Thomas R. Hartley Jr.
Hendrick Auto Mall
Highland United Methodist Church
Jean Holbrook
Holy Trinity Evangelical
Lutheran Church
Donald and Margaret Howell
Craig C. and Lane Huggins Fund
of the Capital Community
Foundation, Inc.
A. Hymowitz Charitable Fund of
Fidelity Charitable
Ronald Iacone*
Insperity Services/
Somebody Cares Humble
Michael Irving
J. W. Massengill Bldrs Inc
Jackson Lewis, P.C.
Mary June and Henry W. Jones, Jr.
Deborah Jurczak
Kelly Eye Center
Keono
Kirk of Kildaire Presbyterian
Vann and Jody Langston
Jeffrey A. Lick
George A. and Alba Lock
Jesse and Laura Lund
Jerry and Cristina Lynch
Lillie Marshburn*
Shirley Martin*
James Mason

Jonathan and Heather Massengill
John C. and Lori McKenney
Monty and Nancy White Fund
of the Triangle Community
Foundation
Steven M. and Joan Morelen
Shaune P. and Janet E. Morley
NANASP
Network for Good
Robert T. and Carol Newcomb
Fund of the National Christian
Foundation
Cecile and Marc Noël
North State Bank
Eileen Notte*
Stacey and Wanda Ohm
Keith and Pamela Oreson Schwab
Charitable Fund
William and Elizabeth Padgett
William E. Palmer and JoAnn Hotta
Schwab Charitable Fund
Elvin Pease
Angelo and Maria Pedroni
Christopher and Susan Pierce
Plymouth Church
James M. and Lillian M. Poole
Ben and Diana Poston
Qualcomm Matching
Grant Program
Raleigh Harley Owners Group
RDUMFA/Raleigh Durham
Mobile Food Association
Amanda Reid
Ridge Road Baptist Church
Linda and Franklin Lewis Robuck, Jr.
Rotary Club of West Raleigh
Mary Carol and David Ruppen
John and Virginia Sall
Sonja I. Salmon*
Paul Santrock
Mark and Rhonda Santry
Seaboard Café Customers
Aruna and Tilak Shah
Sloan Family Foundation
South Raleigh Civitan Club
St. Andrew the Apostle
Catholic Church*
St. Michael's Episcopal Church
Robert P & Michelle L. Stephenson
James L. and Catherine R. Stuart
SunTrust United Way Campaign
Stuart and Lisa Take
Pushkar Tamhane
Michio and Aline Taniguchi*
Frances Gay and Odell Thompson
Thrivent Financial for Lutherans
Thunderbird International Junior
Walter and Rita Thurman
Trailblazer Studios
Jerry and Lisa Wagoner
Wake Electric Care
Eric and Leigh Anne Weikart
Robert A. and Janet Weiss
Dawn and Thomas G. Wilkinson, Jr.*
Wolfpack Ventures Inc.
(dba The Pour House)
Catherine Wood

Christopher L. and Debra Woody
Fund of the Triangle Community
Foundation
Margie H. Wright
Robert T. and Ann F. Wyker
Roger Young and Selene Colmeiro
Zebulon Baptist Church
Judy and Stephen P. Zelnak, Jr.
Thomas P. Zimmerman

Jones Street Circle \$250 - \$999

AARP Cary Area Chapter #3976
Kimberly Adkison
Advanced Maintenance
Advanced Technology Group, Inc.
Bettye Aggerup
Robert and Susan Alexander
Ronald and Mary Jo Alexander
Betty Allen
Elizabeth P. and John G. Alley, Jr.*
Christine Alston
American Airlines
Kirit and Urvashi Amin
Wilma L. Anderson
Anthony J. and Karen Andres
Apex United Methodist Church*
Julietta Apple
Richard Van and Hope Argbright
Teresa Arledge
Ralph Ashworth
Assurance Health Services
Rose Auman
George Aux
Megan Babson
Carol A. Bader
Franklin and Donna Bailey
Lisa Bailey
Onest L. Bailey
T. Edward and Corinna Bailey
Forrest H. Ball
Michael Ball
Margaret and Charles Barham, Jr.
Jerry and Sandy Barker
Kenneth Barker
Fran Barnes-Melvin
Jeffrey and Laurie Barnhart
Edward Barry
Edwin Bartrug
Doris Bason*
James D. Bass
John and Virginia Fund of the
Triangle Community Foundation
Sarah Benbow
Marcia and Frank Bennett, Jr.
Sheila and Hugh Bennett, III
Fund of the National Christian
Foundation
Richard H. and Cynthia P. Bernhard
Christopher G. and Leigh Berrier
Kathryn Best
William Bingham*
Kevin Bisby*
Dale and Glenna Blann
Rita Blickman
Laurie Blizzard
Evelyn F. Boggs

Richard C. and Carolyn R. Booth
Douglas L. and Mary M. Bowman
G. Eugene and Patricia Boyce
Wortham and Karen Boyle
Henry and Ashley Brathwaite
Gail P. Braun
Adam Breeding
Jonathon Brennan*
Briegan Concrete Construction Services
John and Amy Brien*
Geoffrey and Courtney Brock
Constance and David Broich
Michael Brooks
Deborah M. Brown
Dominika Wiktor-Brown & Justin Brown
Donald Brown*
Judith Brunger
Elizabeth Buckley*
George Lee and Cheryl Buckner
Richard A. Burrus*
Buyers Resource Realty
Pauline Bynum
Elise Cagle
Cathy and Steve Calloway
Cameron Property Management
James and Sally Cameron*
Eddie F. Campbell
John and Ann Campbell
Capital City Civitan Club
Robert and Elizabeth Carlin
Justin Carlson & Mary Adelaide Nash
Jennifer Cates
Alyce and William Cavanaugh, III
CEI
CFC of the National Capital Area
Katherine and Orbie Scott Chandler
Ann S. Chapman
Juliane Chappell*
Eddie Chen
Carlisle Chenault*
Beth Cheney
Jan Chopel and Patricia Shackleton*
Christopher D. and Jane K. Chrisawn
Linda Church
Debra and James H. Clare
Beverley Clark
James N. and Kim K. Cleary
Randolph and Pam Cloud
James and Emily Cobb
Code Refinery
Amy Coggins and Chris Houseknecht
Thomas and Cathy Cogswell
Paul Cole and Randall Gaugert
Nell Coletta
Tom and Barbara Conley
Patricia Conroy
Gene and Tracy Cooper
John and Linda Corcoran
Cornelia and Michael Motsinger
Roger and Paula Corner Fund of Fidelity Charitable
Joanne and Peter B. Corson
Covenant Community Church
Daniel Craig
Rachel Crawford

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Ellen Crowley
Sharon and Douglas Cullinan
Curtis and Shanna Anderson
Anne C. Dahle
David and Mary Davenport
John and Mary P. Davenport
Melissa C. Davidian
Amy Davis
Marion Davis*
John R. and Linda Davison
Robert and Elizabeth Dean
Charlene Deaver
John P. and Susan D. Denny
Robert E. Denny
Judy Denton
Harold L. and Linda B. Deters
Ben and Nancy Dew
Celia Dickens
Carl T Dickerson
Coleman A. and Nancy W. Doggett
Glenn Doncaster
Kathy L. Donley
Richard and Linda Donnelly
Terry and Sandra Dover
Susan and Lee Dreyfus
Duke Energy Foundation
Matching Gifts Program
Beverly Duke
Richard Dulaney
Reginald and Elizabeth Dupree
Earthshare NC
Edenton Street United Methodist Church
Richard and Carole Edmonds Family Fund
Cynthia M. Edson
ehungry Inc
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David J. and Kathleen Ellis
Douglas and Carol Elvers
Susan P. Emmerson
Encompass Meetings
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Enviro-AG RDC Services, Inc.
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Lora E. Morf
Rebecca Everett
LuAnn Eyerman
Faith Baptist Church*
Christopher Fanelli
Julene Farrell
Paul S. Fausneucht*
Fellowship Sunday School Class
Nona W. Fetzer
Jonathan Fifield
First Baptist Church of Raleigh
First Citizens Bank & Trust Company
First Congregational Church
Katharine and Charles Fisher, III
Jeffrey and Michelle Fleming
Lela and Lattie Frank Floyd, Sr.
Gregory L. and Melanie Folts
Raymond Fornes

American Endowment Foundation
Sheldon and Deborah Fox Fund of the Triangle Community Foundation
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Debra French
Norman and Carole Frye
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Shayne C. Gad
Susan Gager*
Lillian W. Galphin
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Julia V. Garrison
James Gault
Judy Geaslen
Geoffrey and Marcia Hartwig
Vasudev and Vidya Gharpure
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Gwendolyn H. Goode
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Stephen L. and Linda C. Harrington
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Lloyd and Elizabeth Harvey
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Tim Hazlehurst
Elizabeth A. Heath
Jamesina Henderson*
Richard and Judy Hendrickson
Sylvester D. and Martha Herlihy
Julian and Julia Hernandez*
James and Jennifer Herrick
Lawrence J and Angela Hertzberg
Linda Hickok
Kyle Highsmith
Kevin L. and Patrice A. Hill
Hillyer Memorial Christian Church
Katherine and Daniel Hirscher

Angela Hodge
Mary Hoffman
G. Carl Holsing
Holy Trinity Greek Orthodox Church
Ladies Philoptochos Society
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Debra French
Sim G. and Kaye Honeycutt
Sara Nell and Thomas Dean Hope
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Tracy Huening
Hughes Pittman & Gupton
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Kress Schwab Charitable Fund
Joseph and Norma Krier
Kris Bass Engineering
Lisa Ann Kurowski
Dawn Kusy
LabCorp
Fred and Maria Lado

Robert and Deborah Lafater
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Roy Lang
John S. and Linda Lapp
Claire Latham
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Michael and Joanne Lord
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Lucettegrace
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Colin and Elizabeth McGrath
Janet McLaurin
Pamela McLean
Helen McLeod
Gloria McMillin
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Millbrook United Methodist Women
Donald J. Miller and Jean Gross
Marc and Samantha Miller
Thomas Davis Miller
Randy and Danta Litcher Mills
Mistler Charitable Trust

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Joseph and Elizabeth Mitchiner
Fund of the National Christian
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Robert and Anne Moncsko
Richard W. Monn
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Alva Moore
Jay Edward Moore*
Joe Moore & Company, Inc.
Heidi Moreno
Christopher O. Morgan
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Frances D. and John C. Morisey, Jr.
Fred Morrison, Jr.
Elsie V. Muhlhausen
Holly Murphy
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David Newton
James Gregory Newton
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Rachel W. and Cheyney A. Nicholson
Barbara Niffenegger
Daniel and Janice Norman
North Carolina Biotechnology
Center
North Raleigh United
Methodist Church
Donald Norton
Richard O'Brian*
Patricia O'Leary
Michael and Darci O'Leary
Robert and Sheila Oliva Family
Charitable Fund of Fidelity
Charitable
Susan and George Olson, III
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Michael and Barbara Osborne*
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Charles L. Padvorac*
Phyllis and Paul Page Fund
of Fidelity Charitable
Paragon Commerical Bank
Charles Patch
Charles Pate
Pat and Dewey Pate*
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Mark Penna
Paul Pennell
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Carolyn and Glenn H. Perry, Jr.
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Delores Pollard
Sandra A. Powers
Nadine Prace
Premier Healthcare Solutions
Robert and Virginia Price
Principled Technologies, Inc.
Deborah Procopio
Gregory Prosser
Joseph W. and Susan Puglielli
Joseph and Madeleine Pugliese
Madeleine Puhán
D. Edward and Kathleen Pulliam
Ken and Laura Purchase
W. Trent R. Ragland, III Fund
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Judith and Neil Ramquist
Gisele and Lawson Rankin, Jr.
Betty J. Ray
Susan E. Redmond
Carol Regina*
Edwin A. Brown & Mary Beth Rehm
Renaissance Charitable
Foundation, Inc.
Republic Wireless
Susan and Mark Reyer
Cynthia & George Johnson Rice, Jr.
Diane Richard*
Nathalie E. Richard
Donald Richards*
Ellen Richardson
Richard E. and Judith A. Richardson
Thomas Richardson
John P. Riedy
Christina Rieser*
Rising Sun Pools, Inc.
Angela and Jonathan Roberson
David Rockefeller*
Mary K. Rodgers and Richard Boyd*
Ian Roehrl
Thomas and Arlene Roessler
Charles H. Rogers
Ellen H. Rogers
William Rogers
Dick Roseberry
Kyle and Tina Ross
Roth Family Foundation
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Walter and Sallie Russ
Corinne and Stephen Russell*
Gordon and Annella Rutherford
RWBA 600 Club
Roger G. and Goldie Sample
Dawn and Douglas Sander
Jerry D. and Melody Savage
Karen Schaefer Fund of American
Endowment Foundation
Ronald Schwarz and Mina Levin
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Mahendra Shah
Nipun and Sue Shah
Shanahan Law Group
Jeffrey Shelden
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Ann Shivers
Scott H. Shore and Rebecca Boston
Steven and Darlene Shore
Jerry Scott and Janet Simmons
Judith Skroch
Tiare Bove Smiley
Smith Gardner, Inc.
Janie and William L. Smith, Jr.
Anne and Dan Smith Giving Fund
of Fidelity Charitable
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Lois Morton and David Smith
Pamela J. Smith
Todd P. Smith
Richard and Lisa Solomon*
Kenneth and Karen Sommerville
Anant B. Soni
Floyd Yates Sorrell
Susan C. Sorrells Fund of the
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Foundation
David and Bettie Sousa
Mary Louise Spain
David and Martha Sparrow
James and Alice Sprinkle
St. Andrew's Presbyterian
St. Barnabas Presbyterian Church
St. James United Methodist Church
St. Mark's Episcopal Church
St. Paul's Christian Church
Robert and Betty Ann Starkes
Steamex of NC
Joshua and Anna Stein
Robert E. Steinbugler
David L. Stephan
Susan Stevens
Sharon Stevenson
Stony Hill Baptist Church*
Storr Office Environments Inc.
R. L. Strickland, III
James Edward Struffolino
Sun-Belt USA
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When planning your will here are some simple ways to make a lasting impact for Meals on Wheels of Wake County.

❖ Bequest by Will or Revocable Trust – A Legacy of Giving

Including a charitable bequest in your will or revocable trust is a simple way to make a lasting gift to Meals on Wheels of Wake County. Make of gift of a stated dollar amount, specific property, a percentage of your estate, or the remainder after distributions to other beneficiaries. In doing so you leave a legacy to Meals on Wheels and your community, yet preserve and enjoy assets you might need during your lifetime.

❖ Life Insurance – A Simple Way to Give a Significant Gift

Giving through life insurance is one of the simplest ways to make a significant contribution and establish your legacy of giving. You can designate Meals on Wheels of Wake County as the primary or secondary beneficiary of either 100% or some percentage of the proceeds from the policy. Or you can transfer to Meals on Wheels ownership of the policy – either a policy that is paid in full or one which you intend to continue making premium payments. Depending on the type of policy, a lifetime transfer of a life insurance policy or the future payment of premiums may qualify for an income tax charitable deduction.

❖ Gifts from Retirement Plans – The Perfect Gift Asset

Retirement plan assets (those in qualified plans and IRA's) are ideal for charitable giving purposes because these assets are often heavily taxed when passed on to non-spouse beneficiaries. Making a future gift of retirement plan assets simply requires a designation of Meals on Wheels of Wake County as the beneficiary of the plan. And, if you are age 70 ½ or older, current tax laws allow for a tax-free rollover of up to \$100,000 each year to charitable organizations.

❖ Donor Advised Funds

Donor advised funds are investment accounts that benefit charitable organizations, like Meals on Wheels of Wake County, to which you contribute cash or other assets (during lifetime or at death). Contributions during lifetime are generally eligible for a charitable income tax deduction. As advisor to the fund, you (or someone that you designate to act at your death) direct which charities receive distributions from the donor advised fund.

We recommend that you consult your attorney, tax advisor, or planning professional for these and other estate planning tools.

For information about how your estate plans can benefit Meals on Wheels of County, please contact Mary Kate Keith at 919-256-3873.

Mission

Meals on Wheels of Wake County's mission is to provide nutritious meals to the frail, homebound elderly and persons with disabilities of Wake County in order to improve health, reduce isolation and prevent inappropriate institutionalization, and to serve nutritious meals and provide social and educational opportunities to persons over 60 in eight senior dining sites. We have served Wake County, NC since 1974.

Goals

Our top three goals for our participants are to:

- 1) provide them with a daily, nutritious hot meal that will improve health and diet
- 2) provide them with a daily check-up and visit that makes them feel safer in their homes
- 3) give them the opportunity to continue living independently, with dignity, in their own home

Contact Information



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