



The Spirit of Community

Givens

COMMUNITIES

2023-2025 IMPACT REPORT



MISSION

Creating Community, Empowering Lives

VISION

Endless Possibilities, Vibrant Aging



Along with our vision and mission, we have four core values.

People Passionate

We value every person. We strive to respect, support, enrich, and empower one another.

Make a Difference

We honor our legacy of making a difference in the lives of others. We see opportunities in challenges, seek creative solutions, and work tirelessly to ensure that we are improving and innovating to be a positive force in our community.

Power of Community

We are better and more creative when we work together. We harness the power of community for the greatest possible impact through collaboration, strong relationships, and embracing diversity.

Do What's Right

We act with integrity and accountability, recognizing what is right is not always easy or popular. We take responsibility for our decisions, persevere through challenges, and are good stewards of our resources.



90 Far Horizons Lane | Asheville, NC 28803
(828) 575-1140 | givenscommunities.org



2360 Sweeten Creek Rd. | Asheville, NC 28803
(828) 669-0996 | givensphilanthropy.org



Givens Aldersgate
3800 Shamrock Dr.
Charlotte, NC 28215
(704) 532-7000



Givens Estates
2360 Sweeten Creek Rd.
Asheville, NC 28803
(828) 274-4800



Givens Gerber Park
40 Gerber Rd. #100
Asheville, NC 28803
(828) 771-2207



Givens Great Laurels
80 Candler St.
Waynesville, NC 28786
(828) 452-9747



Givens Highland Farms
200 Tabernacle Rd.
Black Mountain, NC 28711
(828) 357-3611

A Message From The CEO



Kevin Schwab

Chief Executive Officer, Givens Communities

Dear Givens Residents and Friends:

Over the last three years, Givens Communities has celebrated many milestones, including our 50th anniversary, our affiliation with **Aldersgate United Methodist Retirement Community** in Charlotte, North Carolina, and the recognition of long-standing residency and service by residents and team members. Throughout this time, Givens has remained committed to doing what is right as we empower lives in Western North Carolina and now in the greater Charlotte region.

Together with our dedicated leadership team and engaged Board of Directors, we continue to seek partnerships that expand access to affordable housing and services for older adults. Over the years, these efforts have included affordable housing initiatives in Jackson County, McDowell County, and Haywood County. Givens remains steadfast in our commitment to serving older adults across a wide range of income levels and circumstances.

Across our campuses, Givens' focus on vibrant aging has been reflected in continued investment and growth. At Givens Highland Farms in Black Mountain, this included the construction of Brookside Apartments, Vista Ridge Apartments, and expanded common spaces, along with new dining and gathering areas that enhance connection and community for residents.

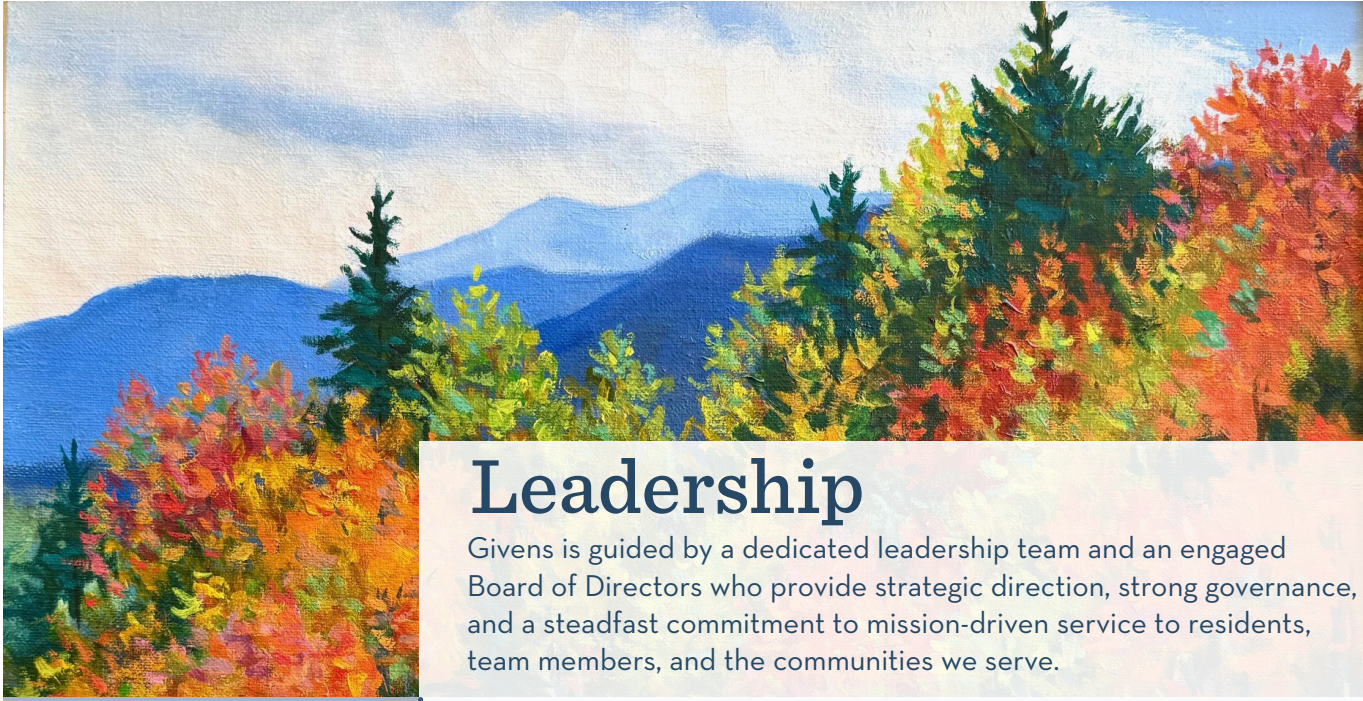
In 2023, **Givens Choice** launched as a Life Plan Community Without Walls, offering a new option for individuals who wish to age in place. The program brings together coordinated access to services, asset protection, care navigation, and long-term planning support, combined with the values and experience of a life plan community, all designed to help participants remain independent in their own homes for as long as possible. In addition, **Givens Home First** was relaunched as a unified program, strengthening our ability to support residents aging in place on Givens campuses.

Givens leadership and the Board have also navigated a comprehensive three-year strategic planning process, recently refreshed to strengthen organizational focus in **three key areas: excellence in experience, people and culture, and expanding our impact**. While the Strategic Plan provides direction, its success depends on ongoing dialogue, transparency, collaboration, and shared understanding across the organization.

Thank you for your support and commitment to our mission. We look forward to another year of growth, innovation, and community building.

Kevin Schwab

President and CEO
Givens Communities



Leadership

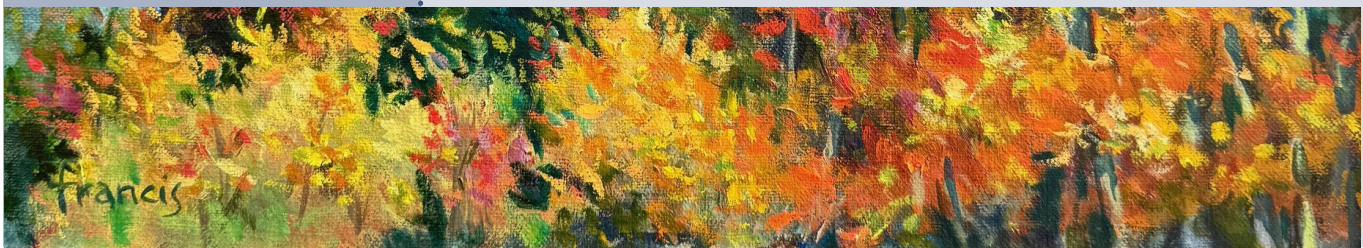
Givens is guided by a dedicated leadership team and an engaged Board of Directors who provide strategic direction, strong governance, and a steadfast commitment to mission-driven service to residents, team members, and the communities we serve.

GIVENS COMMUNITIES LEADERSHIP TEAM

- Kevin Schwab
- Allen Squires
- Scott Farkas
- Cherie Grisso
- Christian Grunder
- Richard Foor
- Neal Lail
- Teresa Stephens
- David Smith
- Brian Guengerich
- Jessie Bosshard
- Ken Kramer
- Kristen Cone
- Matt Sharpe
- Erin Strain
- Taryn Tindall

BOARD OF DIRECTORS

- | | |
|------------------------------------|----------------------------------|
| Mrs. Donna A. Broadwell* | Mr. Gerald H. Meyer |
| Ms. Alisa J. Brown | Mr. Joseph P. McGuire |
| Mr. Kemper Brown, Sr. | Mr. F. Patrick McGuire |
| The Reverend Dr. Mary W. Brown | The Reverend W. Mark Ralls |
| Bishop Kenneth H. Carter, Jr. | Mr. Robert C. Roberts |
| The Reverend Karen L. Easter Bayne | Dr. Catherine A. Rogers |
| Ms. Sheila C. Elingburg | Mr. Roger L. Shaul |
| Ms. Murphy Horne Fletcher | Mr. Robert E. Shepherd* |
| Mr. Douglas R. Ghidina | Dr. Suzanne M. Sutherland |
| Mr. Larry B. Harris | Mr. Kenneth W. Swayze, Jr.* |
| The Reverend Dr. James C. Howell | Mr. G. Edward Towson, II* |
| Mr. Sammy G. Jackson | The Reverend Dr. R. Keith Turman |
| Mr. Horace S. Jennings | Mr. David C. Whilden |
| Dr. Margaret A. Kuhn | Mr. Alfred J. Whitesides, Jr.* |
| Mrs. Doris P. Loomis* | Mr. Denton A. Wilson, Jr. |
| Ms. Rebekah M. Lowe | *Honorary Life Member |





THE SPIRIT OF COMMUNITY

A World of Possibilities

Brian Guengerich
Vice President of Philanthropy

Dear Givens Family,

As we move beyond our 50th anniversary, we do so with deep gratitude and renewed purpose. For more than five decades, Givens Communities has been shaped by a mission-driven commitment to service, excellence, and faith—made possible by residents, team members, volunteers, donors, and partners who believed in something greater than themselves. Philanthropy has been central to that journey. **Nearly \$40 million supported our mission through 2022**, and in the past three years generosity has averaged almost \$4 million annually, strengthening resident assistance, enriching lives, supporting team members, and expanding our outreach across Western North Carolina. In moments of need—such as **after Hurricane Helene**, when nearly **450 donors gave more than \$331,000** to assist team members—our community has shown what compassionate commitment truly looks like.

As our impact and generosity have grown, so has the need for greater clarity and focus. In early 2026, Givens Philanthropy became Givens Foundation, a subsidiary of Givens Communities.



This step strengthens our ability to provide clear reporting and deeper insight into impact while remaining fully aligned with our mission and positioning us to steward resources wisely in the future.

“We have sought out innovation, and we have placed the highest premium so that each and every resident and team member feels seen and valued.”

Looking ahead, our five-year, \$25 million comprehensive campaign is already gaining remarkable momentum, with more than \$23 million raised in its first year. Guided by our vision of Endless Possibilities, Vibrant Aging, we are building a strong, sustainable future—one made possible because of you.

With sincere gratitude,

Brian Guengerich
VP of Philanthropy



The hearts and visions of these individuals are deeply woven into the fabric of our mission and ministry. Givens Communities would not be what it is today without them.

BUILDERS, STEWARDS, HONORARY LIFE BOARD MEMBERS

- | | | |
|-------------------------------|----------------------------------|---------------------------------|
| L. Scott Allen ~ ^ | David E. Hinson + | David G. Pease + ^ |
| William C. Anderson ~ + ^ | Bishop Earl G. Hunt, Jr. ~ + * ^ | Philip N. Sales ~ ^ |
| Embree H. Blackard ~ + * ^ | Gregory D. Hutchins + * ^ | Robert E. Shepherd ~ + * |
| Donna A. Broadwell + * | Horace S. Jennings + * | Patricia S. Smith + |
| F. Edward Broadwell, Jr. ~ | Melba C. Krisher ~ ^ | Hal F. Starnes ~ + * ^ |
| Thomas E. Camp, III ~ ^ | Doris P. Loomis + * | Kenneth W. Swayze, Jr. + * |
| William B. Cagle, Sr. ~ + * ^ | J. Clay Madison ~ + * ^ | G. Edward Towson, II + * |
| Helen S. Chandler ~ + * ^ | Joseph P. McGuire + | James T. Trollinger ~ + ^ |
| John C. Cowan + ^ | Charles E. Nesbitt ~ ^ | Frances C. Waser ~ + * ^ |
| Earl B. Hadlow ~ ^ | Kenneth A. Partin ~ ^ | Alfred J. Whitesides, Jr. ~ + * |
| Bishop Paul Hardin, Jr. ~ ^ | Kenneth M. Partin ~ + | Richard A. Wood, Jr. ~ + * ^ |

Builders ~ | Stewards + | Honorary Life Board Member * | Deceased ^

GIVENS COMMUNITIES BOARD CHAIRS

1976 - Present



- Helen S. Chandler (1976-1983)
- Richard A. Wood, Jr. (1983-2007)
- Robert E. Shepherd (2007-2010)
- Patricia S. Smith (2010-2013)
- Gregory D. Hutchins (2013-2016)
- Doris Loomis (2016 - 2019)
- G. Edward Towson, II (2019 -2022)
- Joseph P. McGuire (2022-2025)
- Horace S. Jennings (Current, pictured left)

From Far Horizon *to* Farther Reaches

THE HISTORY OF GIVENS



1943 -1970

BUILDING

LIFE ENRICHMENT

AFFORDABLE COMMUNITIES

INNOVATION

A Summer Home with a Future

In 1943, **Dr. Maurice and Mrs. Marion Givens purchased a 164-acre property in Asheville, North Carolina**, naming it **Far Horizon Farm**. For nearly 30 years, it served as their beloved summer retreat. After Dr. Givens passed away in April 1970, Marion began envisioning a greater purpose for the property—she imagined Far Horizon Farm as a retirement community offering dignity and security to older adults.



1975

Merging Vision with Generosity

Leaders of the Western North Carolina Conference of the United Methodist Church proposed forming a faith-based senior community. On **August 21**, more than 1,000 United Methodists voted to accept **Marion Givens' gift of 160 acres and a \$2.5 million trust, launching the development of Givens Estates.**

A Board of Directors is appointed, and the effort is incorporated as a nonprofit with a clear mission: to provide **high-quality, compassionate care for older adults—rooted in faith, generosity, and service.**

1977



Architectural plans are unveiled at the Groundbreaking on **Far Horizon Farm**—attended by **Board Chair Helen S. Chandler, Bishop L. Scott Allen**, and board members and Methodist

BUILDING

LIFE ENRICHMENT

AFFORDABLE COMMUNITIES

Construction begins on ten villas containing **78 HUD-subsidized apartments**, marking the foundation for an enduring mission to serve seniors of all income levels.

1979



First residents, sisters Sallie and Naomi Kale from Gastonia, move into temporary housing at Givens Manor. They become beloved community ambassadors, shaping the warm and welcoming spirit that defines Givens to this day.

1979





1981-1982

Rev. James T. Trollinger is appointed as Executive Director—bringing a faith-based vision and practical expertise in design and construction—he oversees construction of the first single-family homes on **Far Horizon Lane** (10 homes) and **Aldersgate Circle** (15 homes).



1987-1988

20 duplexes are built on **Lady Huntingdon Lane** and an 84-bed skilled nursing center opens. The skilled nursing space in Asbury Hall is converted into a 45-bed assisted living facility (later named the **Richard A. Wood, Jr. Assisted Living Center**).

BUILDING

LIFE ENRICHMENT

AFFORDABLE COMMUNITIES

INNOVATION

1982-1984

Asbury Hall Phase I and II are completed, adding community spaces, apartments, and 24 skilled nursing beds.



1984



Jane Golden is hired as the first Director of Resident Services to enhance resident life. In 1988, she was named **Human Services Director of the Year** by the United Methodist Association of Health and Welfare Ministries. Golden's pioneering leadership positioned Givens Estates as a leader in person-centered care.

1989



Asbury Hall Phase III is completed, adding apartments, skilled nursing, and community and office spaces, and solidifies Givens as a **Life Plan Community** offering a full continuum of care.

Faith community nurse **Judy Durham** brings her faith-based outreach initiative, Life Ministries, to Givens Communities. **Givens Life Ministries** outreach programs provide free wellness screenings, health education, and connections to community resources—all designed to address health disparities and promote independence, healthy aging, and improved quality of life. After laying the foundation for what would become a vital community health outreach program, Judy Durham **retires in 2006**.

1998 - 2006



1995 - 2005



Givens' **technology journey** begins under **CFO Allen Squires**, whose team managed systems from **computers** to **resident services**. They laid the foundation for pioneering **Fiber to the Home** infrastructure, positioning Givens as a leader in **senior living technology**.

2000

1992

With a gift from **Louise Sales**, in honor of her aunt and Givens Estates resident **Ruth Parkins**, Givens begins providing **in-home personal care** to residents, allowing them to age comfortably in their homes.

MemoryCare—a new non-profit founded by **Dr. Margaret Noel** to serve the mountain region with expert guidance for caregivers and comprehensive treatment for people living with dementia— is invited to Givens Estates and opens its first office in a repurposed kitchenette in Asbury Hall.



2005

Oxford Commons opens at Givens Estates offering centralizing dining, wellness, aquatics, and performing arts.

Building The Digital Backbone

2005 - 2014

Formal **IT Department** launches and takes **Fiber to the Home** infrastructure to **Court Lane**. Wi-Fi is expanded campus-wide and fiber is added to all new construction and business areas.

A **resident-led tech support volunteer team** is formed, providing **peer training and device help**.

BUILDING

LIFE ENRICHMENT

AFFORDABLE COMMUNITIES

INNOVATION

2005

MemoryCare relocates to **Givens Manor** providing a warm and welcoming space to serve the growing number of caregivers and individuals living with dementia.



2005

Teresa Stephens begins her tenure with Givens, bringing a bold vision for expanding **affordable housing** for low- and middle-income older adults. Over the years, her leadership has been central to the growth of **Givens Affordable Communities**, advancing housing as a public health solution through advocacy, mentorship, and regional partnerships. In 2022, she is honored with **Asheville's Outstanding Woman in Nonprofit Leadership Award** by the Chamber's WomanUP initiative.

2007

Givens takes its mission beyond Asheville with the opening of **Givens Great Laurels**, a **100-unit affordable senior rental community** in Waynesville, situated on six acres across from the main entrance to Lake Junaluska. This was Givens' first use of Low-Income Housing Tax Credits, a vital tool for expanding access for seniors with modest means. **The Duke Endowment** invested in construction and generous philanthropy support enabled amenities for residents such as a community living room, a library, raised garden beds, and a washer and dryer in every apartment.



2006



Registered nurse **Cheryl Wallen** takes the helm as **Givens Life Ministries** program director with a clear sense of calling: to build on her passion for **faith community nursing** and to develop **innovative wellness partnerships that reach underserved and marginalized populations**. Through her leadership, Givens became a regional leader in **outreach, compassion, and community connection**.

2010 - 2012

The Givens Board begins exploring the acquisition of **Highland Farms**, a **308-unit, for-profit, multi-income retirement community** on 50 acres in Black Mountain. With its owners nearing retirement, they sought a mission-aligned organization to continue caring for residents. After a year-long review, Givens acquired the 41-year-old CCRC on December 1, 2012, including 24.7 acres of undeveloped land. An initial \$5.5 million was invested in infrastructure, and longtime collaborator **Dave Hinson** was named its first Executive Director.



2012 - 2018

Givens acquires nearly 13 acres in South Asheville, once home to a Gerber baby food plant, to create its fourth campus—**Givens Gerber Park**. This community was developed in three phases and now includes **262 affordable apartments** for older adults of low to moderate incomes. In addition

to attractive apartments, residents benefit from comprehensive support services: an **on-site clinic, Community Nurse, Resident Services Coordinators**, wellness programs, and convenient access to shops and public transit.

BUILDING

LIFE ENRICHMENT

AFFORDABLE COMMUNITIES

INNOVATION

Expanding Standards and Reach

2014 - 2024

Ricky Foor joins Givens with nearly a decade of healthcare technology experience, leading innovations uncommon in the Continuing Care Retirement Community (CCRC) industry—such as **in-room communication systems** and **enhanced safety** and convenience across campuses. Beginning in 2019, Givens strengthened its system-wide technology strategy, including a **full cloud migration** that improved flexibility during events like COVID-19 and Hurricane Helene.



2015 - 2019

Givens Estates completes their final phase of **Creekside Apartments**, expanding independent living options with modern, accessible units.

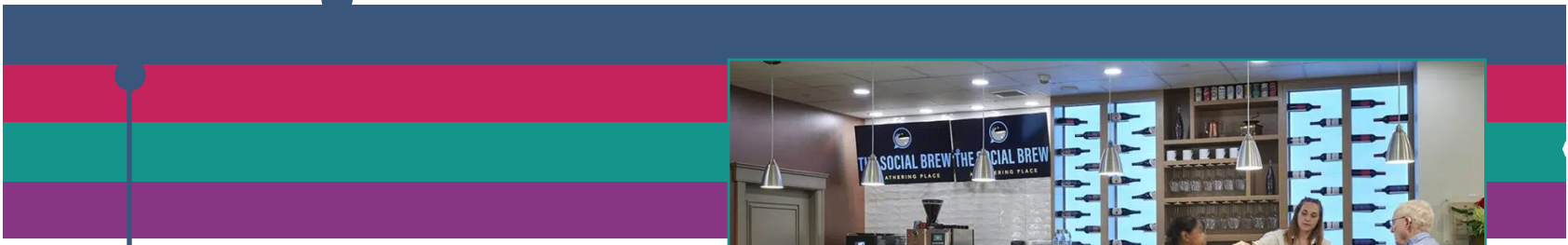


2020 - 2024

As part of a ten-year strategic plan, Givens Estates launches a **\$7.6 million renovation of Oxford Commons**. The first phase includes three new dining venues followed by a full Performing Arts Center refresh and a Wellness Center expansion featuring new

studios, advanced fitness equipment, and private therapy rooms—supporting residents’ evolving expectations for lifestyle and health.

Givens breaks ground on **Friendship Park** in **2020**, a **two-phase expansion** in a wooded, streamside setting. **Phase I** welcomed residents to **35 apartments** in **May 2021**, followed by **Phase II** with 45 additional apartments in **2022**.



With funding from the State Employees Credit Union Foundation, MemoryCare opens the **SECU Center for MemoryCare**. Approximately **40% of its clients are low-income**, reinforcing its mission-driven roots and the importance of Givens’ early and sustained support.



2018



2021

Givens Estates completes a major expansion introducing the Market Craft bistro and The Social Brew coffee shop. The Jordan Center, named in honor of **Will and Carlotta Jordan**, was added to provide on-site physical therapy.

2022

Givens launches **Givens Choice**, the first **Continuing Care at Home** program in Western North Carolina. This membership-based model offers older adults personalized, home-based long-term care through comprehensive care coordination, care coverage, and financial protection—all designed to **support aging in place with dignity and peace** of mind. The program was developed following an exploratory committee, and **Erin Strain, then Director of Life Enrichment**, was selected as Executive Director to lead the initiative.



The **Brookside Commons** project at Givens Highland Farms is completed in fall 2023, adding a new assembly room, dining space, community rooms, and 36 apartments. In spring 2024, **Vista Ridge North** opened with 36 new apartments, and **Vista Ridge South** followed in fall 2025 with 33 new apartments.

2023 - 2025

BUILDING

LIFE ENRICHMENT

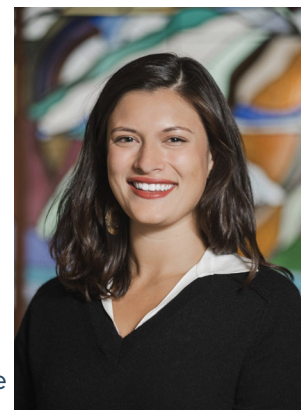
AFFORDABLE COMMUNITIES

INNOVATION

2022

Givens expands its strategic vision for **Home and Community-Based Services (HCBS)**,

delivering trusted, high-quality care directly into the broader community. This approach ensures older adults can thrive in their own homes, reflecting Givens' mission to meet people where they are. **Jessie Bosshard** led this effort as Executive Director, earning national recognition as a **2024 McKnight's "Rising Star" Woman of Distinction** for her leadership.



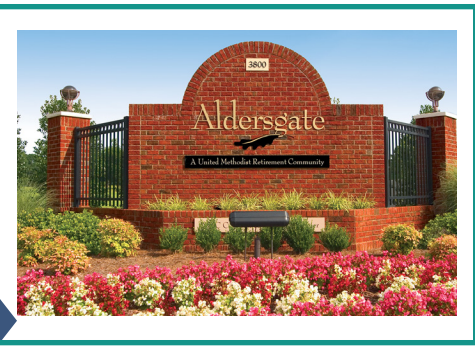
2022



Givens purchases the historic **Clinchfield Mill** in Marion using a \$3 million grant from **Dogwood Health Trust**. Originally a textile mill built in 1917, the site will be transformed into **141 affordable apartments** for seniors, with plans to collaborate with additional nonprofits to further develop the surrounding land.

2024

Renovation of the historic Manor House at Givens Estates was completed, creating new administrative offices and enhancing life enrichment spaces for residents, while reusing materials, improving sustainability, and modernizing facilities. This milestone was made possible through the generosity of **Allen and Julia Anne Dawson; Ed and Donna Broadwell; Charles and Jean Johnson; Will and Carlotta Jordan; Diana Lennox Latta; Bill and Janet Leonard; Pim Little; Martha Lowe Family; Kathy Miritello; Ken and Peggy Partin; the Rusty Pulliam Foundation; and Martha Rowlett.**



2025

The membership affiliation between Givens Communities and **Aldersgate United Methodist Retirement Community** in Charlotte was finalized in August, marking Givens' first expansion beyond Western North Carolina.

2023

Givens unifies its home care services at Estates and Highland Farms with the launch of **Givens Home First**. This personalized, in-home care program offers adaptable support to help older adults maintain independence, dignity, and meaningful connection. The program reflects a continued evolution of HCBS under the leadership of **Jessie Bosshard**.



2024

Givens Home First launches the **Aging in Place** program, available to all residents of Western North Carolina. The service provides **home assessments and modifications** to enhance safety, accessibility, and independence—completing over **300 projects** to date, including a **\$50,000+ renovation** for a resident living with **Parkinson's** and the outfitting of a **smart-tech apartment at Asbury Commons**, which went under contract the day it was listed. The program is led by **Julie Moses**, Director of Aging in Place and longtime Givens team member, whose early home visits and adaptive solutions helped shape this forward-thinking model of care.



Stronger *Together*

COMMUNITY, COMPASSION,
AND RESILIENCE

On September 27, 2024, Hurricane Helene swept through Western North Carolina, impacting residents, team members, and families across Givens Communities. While the storm tested our resilience, it also revealed the extraordinary strength of our shared compassion and the power of community to come together in times of need.

In the days that followed, generosity flowed from every corner of our community. Through donor support and collective action, more than \$300,000 was raised for the Team Member Assistance Ministry, providing critical relief for housing, food, transportation, and other urgent needs. Over 10% of our team members received





assistance—an expression of care that honored their dedication and safeguarded their ability to continue serving others.

As residents and team members leaned on one another, a renewed sense of connection emerged. A Givens Highland Farms resident shared how gathering for breakfast and “linner” during the storm strengthened bonds: “It was a chance to connect with neighbors, hear each other’s stories, and witness the teamwork of the staff as they

pitched in to help each other and us. I know many of them put our safety and well-being ahead of their own.”

The response to Hurricane Helene stands as a powerful testament to the heart of Givens Communities—a place where generosity, teamwork, and shared responsibility create resilience. **We are deeply grateful to everyone who gave, volunteered, and stood alongside our residents and team members.** Your compassion made a lasting difference and continues to define who we are.





Celebrating **50** Years of Service

This year, we celebrated the 50th anniversary of Givens Communities, a remarkable milestone that anchors our deep, decades-long commitment to serving older adults of all income levels. From our beginnings with HUD 202 housing in 1975 to becoming a regional leader in senior living, our story has been shaped by the people who built, supported, and believed in this mission across five decades.

Our anniversary gave us the chance to honor our roots, celebrate our progress, and re-commit to the values that have guided us from the start: service, excellence, and the unwavering belief that every older adult deserves purpose.



In August 2025, nearly 250 friends, partners, residents, and supporters gathered at Highland Brewing to celebrate a remarkable milestone—50 years of Givens Communities. The evening was filled with joy, reflection, and forward-looking hope, highlighting what is possible when a community unites around a shared mission.

Guests reflected on five decades of compassionate service while celebrating the present and imagining the future. From the opening performance by the Asheville Symphony Chamber Quartet to the high-energy sounds of The Dasher Band, the atmosphere buzzed with gratitude. Attendees also enjoyed an exceptional dining experience prepared by the culinary teams at Givens Estates and Givens Highland Farms.

The program featured inspiring remarks from Teresa Stephens, Vice President of Affordable Communities, and Sabrina Presnell Rockoff

of McGuire Wood & Bisette, who spoke to Givens' legacy of affordability and the power of community partnership. The celebration was made possible by presenting sponsors McGuire Wood & Bisette and Blum Construction, along with other generous businesses whose support exceeded \$100,000—an inspiring tribute to the people who have shaped Givens over the past 50 years and those who will carry it forward. It was a night that honored our history while reaffirming our shared commitment to compassion, community, and courage.



The Next Chapter

2026 & BEYOND

Innovation, Growth, and Impact

ADVANCING LONGEVITY AND BRAIN HEALTH AT GIVENS COMMUNITIES

Givens Communities is proud to launch the **Givens Longevity and Brain Health Program**, a significant new initiative designed to advance whole-person wellness by supporting residents and team members in living healthier and more engaged lives for longer. This effort reflects Givens' long-standing commitment to innovation in aging and positions the organization as an emerging leader in proactive brain health and longevity-focused living.

Across the country, there is growing recognition that **longevity is about more than extending years of life – it is about enhancing quality of life**. Research shows that everyday factors such as physical activity, nutrition, social connection, lifelong learning, and stress management meaningfully influence long-term holistic health.

Brain health is central to this work, as cognitive resilience supports mobility, judgment, emotional balance, social connection, and independence. While Alzheimer's and other dementias remain serious public health challenges, evidence-based lifestyle choices can help increase cognitive reserve and support brain health across the lifespan.

At Givens, wellness, life enrichment, and health services have always been central to community life. The Longevity and Brain Health Program builds on that foundation through a shared framework that applies aging science to implement best practices across campuses

and service lines. By integrating principles of longevity and brain health into dining standards, programming, education, and care delivery, Givens is empowering residents and team members to take proactive steps that support cognitive vitality and overall well-being.

Year One: Building the Foundation

In FY26, the program moves from vision to action. The first year is intentionally focused on building a strong and sustainable foundation – establishing shared understanding, strengthening team member capability, and launching carefully selected pilot programs that translate research into lived experience.

Creating a Shared Culture of Understanding and Inclusivity

A system-wide dementia education initiative will establish a common language and baseline of understanding across roles. Beginning with a foundational in-person session supported by

short digital modules, the program will ensure that team members are equipped with practical knowledge and interactional confidence. Over time, this infrastructure will expand to include more advanced role-specific training and the development of internal Dementia Support Leads and Educators.

Pilot Launch: Brain Health Studio

The most visible Year One initiative is the introduction of a **Brain Health Studio at Givens Highland Farms** within the new Wellness Center.

Launching this spring, this dedicated space will offer residents structured, dual-task cognitive-motor training through specialized exergaming equipment – an approach designed to challenge the brain and body simultaneously. Research indicates that combining physical movement with cognitive engagement supports executive function and cognitive resilience.

The Studio will serve as a learning laboratory, with resident participation and operational insights from this pilot guiding thoughtful, financially responsible expansion across Givens communities' in the future.

Two additional brain health initiatives are currently in early conceptual planning. While not yet finalized, these pilots reflect the same guiding principles: grounding innovation, collecting data, and evaluating outcomes, and scaling responsibly as learning occurs.

Looking Ahead

FY26 is about building wisely and intentionally—internal capacity through education, launching targeted innovations, and learning from early implementation—to taking the first steps in building a sustainable, integrated approach to longevity-focused living.



Taryn Tindall

Taryn Tindall serves as Director of the Givens' Longevity and Brain Health Program, bringing more than 15 years of leadership experience in senior living, with a focus on clinical practice and whole-person wellness. A Registered Nurse, Certified Dementia Practitioner, licensed Nursing Home Administrator, and MBA, Taryn brings a rare combination of clinical fluency, operational insight, and regulatory understanding to this work. Her background enables her to translate emerging science, innovation, and thought leadership into evidence-based initiatives that can be embedded across the organization. She approaches longevity as the extension of healthspan, and her work centers on building infrastructure that supports sustained function, independence, and agency.

Previously, Taryn led wellbeing initiatives at Deerfield Episcopal Retirement Community, where she oversaw resident services operations and worked closely with residents and teams to launch new programs and strategic partnerships to enhance resident wellbeing, engagement, and quality of life.

Importantly, this new initiative is **fueled by philanthropic support**. Generous gifts allow Givens to invest in innovation, pilot emerging models, and expand access to brain health resources across our communities—advancing a model of aging that strengthens health span and ensures that older adults have the opportunity to stay engaged, connected, and thriving at every stage of life.

Five Communities, One Mission

As we look toward the next decade, Givens Communities is balancing bold planning with ongoing excellence. A newly finalized master plan directs major campus development at Givens Estates and Highland Farms, while Gerber Park, Great Laurels, and Aldersgate continue delivering meaningful impact through their own initiatives. Across all five communities, resident input and careful stewardship guide every step forward. Together, these efforts reflect one mission: **building strong communities with endless possibilities for vibrant aging.**

GIVENS ESTATES

Over the past three years, Givens Estates has achieved significant milestones reflecting our commitment to excellence, resilience, and innovation. **In 2025, we were honored to be ranked #1 in North Carolina and #6 nationally on Newsweek’s list of America’s Best Continuing Care Retirement Communities.** In 2024, we earned CARF accreditation for another five years, reaffirming our dedication to quality and person-centered care.

Our campus demonstrated extraordinary teamwork and preparedness during Hurricane Helene in 2024, ensuring safety and continuity for residents and team members. Strategic objectives were advanced through the successful implementation of the Citizenship model, strengthening engagement and belonging while reducing team member turnover. We also completed a **new Welcome Center** designed to enhance security and create a warm, welcoming experience for all. In 2025, we shared a refreshed



KIRSTEN CONE
Executive Director, Givens Estates

master plan focused on expanding health services, including **enhanced assisted living** and **memory care.** These accomplishments reflect our unwavering focus on community, safety, and innovation as we look to the future.



A TRIBUTE

Lives That Made a Difference



Charlotte Lunsford Berry

January 6, 1931 ~ November 7, 2025

Charlotte Berry's life reflected the power of service rooted in compassion. From her first childhood fundraiser to more than eight decades of humanitarian leadership, she remained committed to making a difference. A trailblazer with the American Red Cross, she became the Asheville chapter's first female chair and later served as National Chairman of Volunteers, guiding more than one million volunteers nationwide.

In her final years as a resident of Givens Estates, Charlotte continued to lead by example, bringing regular Red Cross blood drives to campus and inspiring residents and neighbors to give. Though she passed away at age 94, her legacy lives on in every life she touched—from the students she mentored to each donor who rolled up their sleeve at a Givens blood drive. Her life reminds us that philanthropy does not begin with dollars; it begins at home, through acts of kindness that ripple outward and endure.



Oscar Wong

October 21, 1940 ~ May 25, 2025

Oscar Wong's journey began as the son of Chinese immigrants in Jamaica and led him to Notre Dame where he earned engineering degrees. After a successful career, he retired to Asheville in 1992. There, what started as a hobby in homebrewing blossomed into founding Highland Brewing Company in 1994, the city's first legal craft brewery since Prohibition, earning him the title "Godfather of Asheville Craft Beer." Oscar helped shape Asheville's national reputation as a craft beer destination while mentoring employees and building meaningful community connections.

His generosity extended far beyond business. Oscar served on the UNC Asheville Board of Trustees, led Asheville Rotary, chaired the ARC of Buncombe County, and was recognized with North Carolina's Order of the Long Leaf Pine. As a Givens Estates resident, his commitment to service remained strong. Oscar passed away at age 84, leaving a legacy of leadership, philanthropy, and family stewardship that continues through Highland Brewing and the many institutions he strengthened.

*Nationally
Recognized
Philanthropic
Leaders and
Givens Estates
Residents*



GIVENS HIGHLAND FARMS

Over the past three years, Givens Highland Farms has experienced one of the most transformative periods in our campus history. We opened **Brookside Commons**, introducing enhanced dining experiences and vibrant new gathering spaces, while adding beautifully designed apartment buildings that offer upgraded features and stunning mountain views. We've also expanded our amenity base with the newly completed **Brookside Hub**, which features a new art studio, a state-of-the-art classroom, flexible living and kitchen space, and patios that include resident greenhouses.

The **Wayside Wellness Center** has been significantly enhanced as well, with a modern fitness center, a brain health studio, a spacious group fitness studio, and an expanded health clinic that will also

support the greater Black Mountain community. We also opened a new **Memorial Garden**, creating a sacred and meaningful space for remembrance on our campus.

Looking forward, we are now in the planning phase for a new **Meadowmont neighborhood**, with development anticipated to begin in early 2026.



Together, these milestones reflect our ongoing commitment to enriching resident life and investing in a thriving, forward-looking community.



MATT SHARPE
Executive Director, Givens Highland Farms

Brookside Hub: A Community Vision Realized

In November, Givens Communities celebrated a major milestone with the successful completion of the **\$800,000 Brookside Life Enrichment Center Campaign at Givens Highland Farms.**

Fueled by extraordinary resident and community generosity—and anchored by a transformative **\$400,000 matching gift from the Givens Highland Farms Resident Association Council (formerly HFRC Board)**—the campaign reflects the power of shared vision and collective investment in community life.

In addition to their extraordinary financial leadership, the Givens Highland Farms Resident Association Council played an active role throughout the campaign and planning process. Council members and residents offered thoughtful input, shared insight, and helped guide both the function and feel of the Brookside Hub—ensuring the space reflects the needs, values, and aspirations of the community it now serves.

Fundraising for the Life Enrichment Center began in March 2024 and quickly gained momentum through the leadership and commitment of residents, vendors, and friends of Highland Farms. Their support ensured not only that the campaign reached its goal, but that it did so with broad participation and deep enthusiasm for what the space would represent.

Following receipt of the building permit in April 2025, construction moved forward and was completed in early 2026. The Brookside Hub opened in March 2026 as a new multipurpose gathering space for residents.

Designed with residents at the heart of every decision, the Brookside Hub serves as a dynamic gathering place that supports connection, creativity, and lifelong learning. The space brings residents together through a fully equipped 60-seat meeting and classroom area with modern technology, a light-filled art studio, a welcoming kitchenette, and comfortable living

room-style spaces that encourage both planned programs and spontaneous connection. Thoughtfully designated spaces within the Hub include the **Lynne Community Room, Herb and Jane Johnson Kitchen, Mary Anne Art Patio, Linnea Greenhouse, and Marco Patio**, each honoring the intentions of generous supporters.

As Brian Guengerich, Vice President of Philanthropy, shared,

“This campaign is a powerful example of what happens when a community comes together around a shared vision. The generosity, trust, and commitment of our residents and friends made the Brookside Hub possible, and this space

will enrich daily life at Highland Farms for many years to come.”

More than a building, the Brookside Hub represents a renewed investment in community life at Highland Farms—a place where residents will gather to learn, celebrate milestones, explore creativity, and simply enjoy one another’s company.



GIVENS GERBER PARK



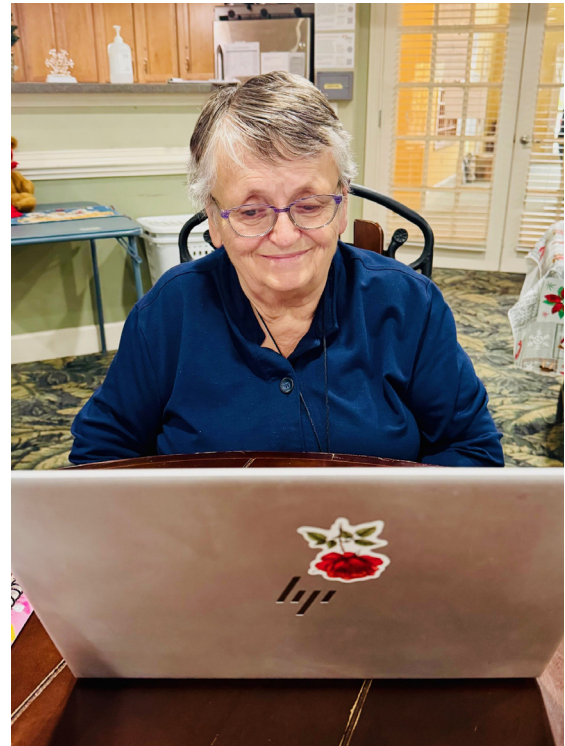
In 2025, Givens Gerber Park residents demonstrated strong leadership and community spirit through the Resident Council's creation of a **resident website** and the **Neighbors Helping Neighbors** handbook and support network. These efforts strengthened communication, connection, and mutual support across the community.

Gerber Park also partnered with Land of Sky to address **digital literacy needs**, providing refurbished laptops to residents who completed the training program. Community Nurse Brynn Barale launched **Nourish to Flourish**, a mindful eating program designed to support healthier, more intentional nutrition habits. The program was well attended and warmly received, further enhancing resident wellness and engagement.

"I have lived in both Givens Estates and Givens Gerber Park ... I have found them to be places of peace and serenity—a place that supports my art and love of nature, which is fed daily by the beautiful scenery surrounding us."

—Tina Stauber, artist (facing page)





GIVENS GREAT LAURELS

Givens Great Laurels welcomed several new team members in 2025, including Community Manager Michelle Cave, who brings extensive property management experience and a strong focus on resident engagement. The campus partnered with Haywood Community College to expand digital literacy opportunities through the **Digital Navigator program**.

Residents who completed the program received computers and ongoing support as they learned to use digital devices and smartphones. The classes were enthusiastically received, and residents are excited to continue participating through 2026—strengthening access, connection, and independence within the community.





KEN KRAMER
Executive Director,
Givens Aldersgate

GIVENS ALDERSGATE

Givens Aldersgate continues to build on a strong tradition of service, innovation, and community connection. Over the past three years, Aldersgate has **advanced sustainability and engagement** through partnerships such as Innovation Barn to reduce waste, Myers Park United Methodist Church Youth Group to maintain campus trails, and a resident-led Christmas Fund that honors hourly team members. The Ignite Program supports year-long leadership development for staff, while partnerships with organizations including Our Bridge, GenOne, Charlotte Is Home, UMAR, and others extend Aldersgate’s impact across the region.

Aldersgate also demonstrates compassion through its **Annual Angel Tree**, supporting the **Resident Assistance Fund** to ensure residents can continue living at Aldersgate when personal resources are depleted through no fault of their own. Additional highlights include a food and clothing pantry for team members, hosting clinical rotations for students from UNCC, CPCC, and NY Dietetics, the opening of **SpringHouse Square**

as a vibrant community space, and a **resident-led Community Garden** promoting wellness and sustainability. Together, these initiatives foster a community where residents and team members feel supported, valued, and connected.



Aldersgate Holiday Gala: A Celebration Powered by Residents

On a crisp December evening, the Givens Aldersgate community gathered for its annual Holiday Gala—an evening filled with warmth, beauty, and connection. Guests were welcomed by twinkling lights and festive décor, live piano music, and thoughtfully prepared appetizers, creating an inviting space for residents, team members, and guests to mingle, share stories, and celebrate together.

More than a festive gathering, the Gala reflects



a long tradition of resident-led philanthropy at Aldersgate. What began in 2019 as a small Mission Advancement effort—focused initially on the Urban Farm and later on helping residents in need—has grown into the **Resident Philanthropy & Community Engagement Committee**, a fully volunteer-led group dedicated to service, generosity, and community connection.

The Holiday Gala, offered free to all residents and entirely planned and hosted by this committee, has become a beloved annual tradition. Their care, creativity, and commitment ensure that every guest feels welcomed and valued year after year.

Beyond the Gala, the committee's impact is felt across campus and throughout the broader Charlotte community. Each December, the committee coordinates the Angel Tree, raising thousands of dollars for the **Givens Aldersgate Resident Assistance Fund**—originally known as the Guardian Angel Fund—and now the committee's primary philanthropic focus.

The committee's work extends far beyond financial gifts. Members actively encourage, organize, and support resident volunteerism, helping connect residents with meaningful opportunities to serve. Residents generously share their time and talents in support of organizations such as Habitat for Humanity, Junior

Achievement, refugee support programs, and United Women initiatives, among many others, contributing a reported **3,072 volunteer hours last year alone**, with countless additional hours given quietly and without recognition.

Givens Philanthropy is deeply proud of and grateful for the leadership, generosity, and dedication of the Resident Philanthropy & Community Engagement Committee. Their work, built over years of resident commitment, strengthens our mission and reminds us that community is built one act of generosity at a time.



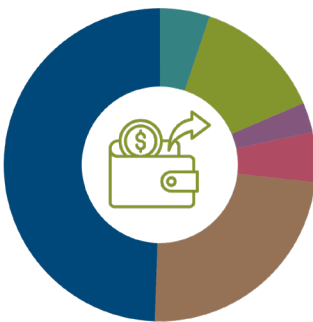
GIVENS COMMUNITIES

Financials

2023-2025 Consolidated Financial Statements and Summary

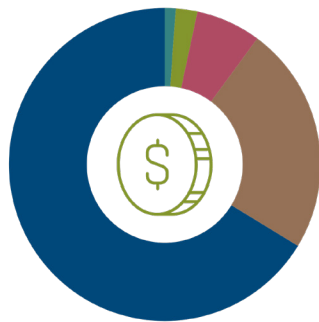
	2025*	2024	2023
	*Un-audited report as of December 31		
Assets			
Current Assets	\$98,495,055	\$68,510,840	\$39,948,964
Property and Equipment Net	\$415,222,297	\$240,922,006	\$226,624,975
Other Non-Current Assets	\$120,495,284	\$108,744,927	\$119,224,435
Total Assets	\$634,212,636	\$418,177,773	\$385,798,374
Liabilities & Net Assets			
Current Liabilities	\$20,742,868	\$32,080,762	\$26,004,781
Long-term Liabilities	\$446,526,300	\$262,721,153	\$258,168,908
Total Liabilities	\$467,269,168	\$294,801,915	\$284,173,689
Total Net Assets	\$166,943,467	\$123,375,858	\$101,624,685
Total Liabilities & Net Assets	\$634,212,635	\$418,177,773	\$385,798,374
Statement of Operations			
Unrestricted Revenues, Gains & Other Support	\$115,535,538	\$101,294,940	\$78,511,540
Total Expenses	\$102,510,723	\$82,297,874	\$68,340,129
Operating Income	\$13,024,815	\$18,997,066	\$10,171,411
Total Non-Operating Income (Loss)	\$10,305,972	\$63,170	\$5,565,715
Excess (Deficit) of Revenues over Expenses	\$23,330,787	\$19,060,236	\$15,737,126
Change in Net Assets			
Change in Unrestricted Net Assets	\$39,054,263	\$19,624,632	\$16,405,216
Net Assets, Beginning of the Year	\$123,375,858	\$101,624,685	\$83,803,585
Change in Temporary Restricted Net Assets	\$4,513,346	\$2,126,541	\$1,415,884
Net Assets, End of Year	\$166,943,467	\$123,375,858	\$101,624,685

EXPENSES



- 48% Residential
- 23% Nursing
- 5% Assisted Living
- 3% Outreach*
- 13% Depreciation & Amortization
- 5% Interest

REVENUES



- 59% Service Fees: Independent Living
- 21% Service Fees: Independent Living
- 6% Service Fees: Assisted Living
- 1% Contributions
- 2% Investment Income

Percentages may not total 100% due to excluded categories (e.g., home care, realized gains).

FITCH-RATED: A PICTURE OF FINANCIAL HEALTH

Our strong commitment to financial stewardship was once again recognized by Fitch Ratings, which reaffirmed Givens' A- rating with a Stable Outlook. This distinction reflects strong demand indicators, solid operational performance, and thoughtful leadership. Fewer than 10% of Life Plan Communities nationwide are Fitch-rated, and only about 20% of those achieve an A- rating or higher—placing Givens among the strongest and most financially sound organizations in the country.

**Givens Communities' preliminary 2025 contribution toward Community Benefit exceeded \$6.6 million. Community benefit includes unreimbursed healthcare, housing, and services and supporting community outreach initiatives, including Givens Affordable Communities, Givens LifeMinistries, MemoryCare, and other regional partners.*

Philanthropy



Our Values

- Givens Cares
- Outreach & Affordable Communities
- Future & Innovation
- Life Enrichment
- Givens Grows

GIVENS FOUNDATION

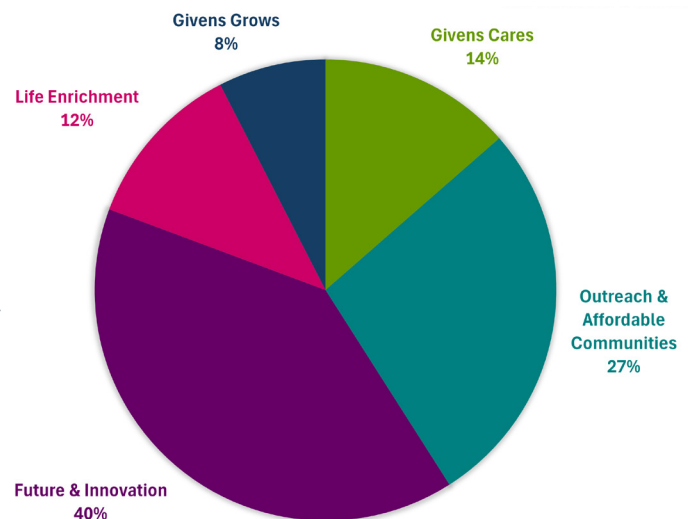
Givens Communities is recognized nationally for excellence in senior living—but excellence alone does not ensure that every resident has what they need to thrive. Through the Givens Foundation, **philanthropy bridges the gap between operations and true wellbeing.**

Each fund advances a focused area of impact—from resident support and team development to affordable housing, life enrichment, innovation, and emergency assistance—strengthening community and expanding opportunity for all.

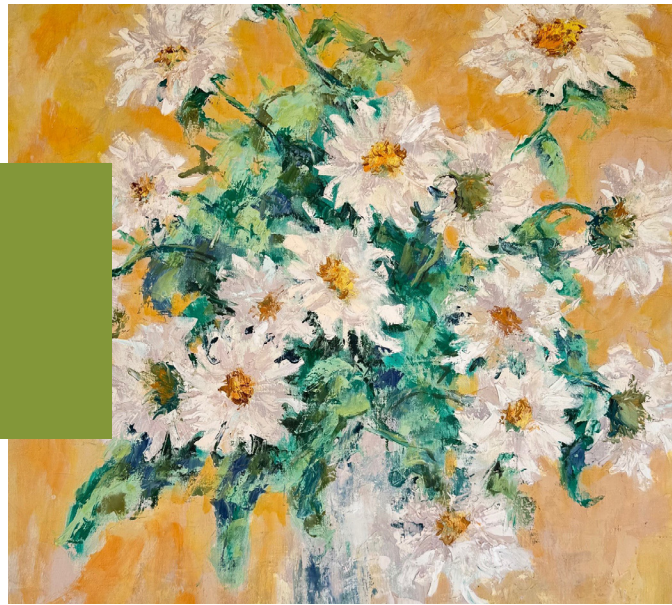
Over the past three years, more than **\$12M** has been generously contributed by individuals, organizations, foundations, and government partners. The chart below reflects donor-designated support across these five impact areas.

Philanthropic support fuels innovation. Your gifts are not used to simply keep the lights on—they are used to spark transformation.

GIVENS GIVING BY IMPACT AREA



Community Benefit IN ACTION



Investing in Partnerships

Over the past three years, **Givens Communities** has strengthened its commitment to the broader community by **partnering with 40+ organizations** across Western North Carolina. Through more than **\$180,150 in sponsorship support**, Givens has proudly sponsored organizations whose missions align with our desire to uplift, empower, and connect people throughout Western North Carolina.

Community benefit encompasses the programs, services, and financial support Givens Communities provides to both our residents and the broader local community. These initiatives improve access to care, strengthen partnerships with local nonprofits, and address pressing community needs.

Community benefit efforts are funded as part of Givens Communities' mission-driven operations and commitment to the region—*they are not supported by donor-restricted philanthropic dollars.*



Platinum Sponsor of Martin Luther King, Jr. Prayer Breakfast



Presenting Sponsor of Symphony in the Park, Asheville Symphony



Diamond Sponsor of Deck the Trees, Swannanoa Valley Christian Ministry



MANNA partner through hands-on volunteer service and over \$60,000 in Vespers Offerings and grocery support



Chamber Champion Sponsor of Black Mountain and Swannanoa Chamber of Commerce



Presenting Sponsor of 2025 Chamber Challenge 5k, Asheville Chamber of Commerce

RESIDENT ASSISTANCE MINISTRY

A Lifelong Home

Givens Cares Resident Assistance Ministry reflects Givens Communities' commitment to dignity, compassion, and lifelong belonging. This ministry ensures that residents who have outlived their financial resources can continue meeting essential needs and remain in the place they call home. Across all campuses, one in five residents relies on this support, which helps cover healthcare, daily living expenses, food, and medical equipment.

One resident shared, "When my husband needed long-term care for an illness, our savings went toward his care. As I face my own health challenges, having the assurance that I can stay in the place I love, surrounded by friends, brings me peace every day."

Kevin Schwab, CEO of Givens Communities, noted, "Resident Assistance Ministry is the program within Philanthropy that helps support residents who run out of funds through no fault of their own. This fund allows residents to live in their place and receive the same level of care they would normally. It has been a tremendous impact...It touches our mission statement of empowering lives and creating community for these residents."

With rising healthcare costs, increased longevity, and inflation, sustaining the Resident Assistance Ministry is more important than ever. The need continues to grow, and maintaining this fund ensures that residents who outlive their means



"When my husband needed long-term care for an illness, our savings went toward his care. As I face my own health challenges, having the assurance that I can stay in the place I love, surrounded by friends, brings me peace every day."

can continue to have a lifelong home and the care they deserve.

By supporting Givens Resident Assistance Ministry, donors ensure that every resident who calls Givens home can age with security, dignity, and peace of mind. Your generosity keeps the promise of lifelong belonging alive.

GIVENS CARES



TEAM MEMBER ASSISTANCE

Scholarship in Action

*Two Students Reflect the Heart
of the Givens Cares Mission*

Givens Cares Team Member Assistance reflects our commitment to supporting the dignity, growth, and success of our team members through scholarships, workforce development, and financial assistance. One of its most meaningful initiatives is the **Julia McCoy Scholarship**, established by Julia McCoy, the late Director of Training and Development. Julia was known for her deep dedication to education, professional development, and compassionate leadership. This scholarship honors her legacy by helping students pursue their academic goals while strengthening their connection to the Givens community.

Two of our 2025 recipients, Mary Grace (MG) and Charlie, exemplify the impact of this support.

MG, an Environmental Sciences and Sustainability major at UNC Greensboro, shared that receiving the scholarship eased the financial strain of balancing school with work. “I felt immediate relief and gratitude. It means I have more time to focus on my studies and explore opportunities like applying to the Honors College,” she said. MG’s passion for environmental protection and her connection to Givens—where she works in Dining Services during breaks—continue to shape her dedication to service and sustainability.

Charlie, a Chemistry major at East Tennessee State University, described his reaction similarly: “I was so happy. It meant I didn’t have to take on a part-time job. I could focus completely on my studies and homework.” With this support,

Charlie is pursuing research in Alzheimer’s disease and hopes to contribute to advancements that will benefit aging communities like ours. “I want to help improve treatment outcomes by understanding how genetics influence medication response,” he shared.

Together, MG and Charlie demonstrate the heart of the Givens Cares mission—uplifting team members and their families so they can grow, learn, and pursue meaningful futures. Their stories capture what matters most: opportunity, education, and a commitment to making a difference.

When you give to Team Member Assistance, you help shape the futures of the people who care for our residents every day. Your support empowers education, lifts financial barriers, and fuels the dreams of our Givens team.



*“I felt immediate relief
and gratitude. It means
I have more time to
focus on my studies and
explore opportunities
like applying to the
Honors College.”*

OUTREACH & AFFORDABLE COMMUNITIES

TRANSFORMING HISTORY INTO AFFORDABLE HOUSING

The Story of Clinchfield Mill

Givens Affordable Communities support the universal need for safe housing, meaningful social connection, and help navigating an increasingly complex healthcare system—needs that are especially urgent for older adults with limited access to essential services. This mission is powerfully demonstrated in the redevelopment of the historic Clinchfield Mill in Marion, a four-story textile landmark built in 1915 that once anchored the region’s economy. A transformative **\$3 million investment from Dogwood Health Trust** accelerated the vision, and Givens worked closely with the Town of Marion, McDowell County officials, and the McDowell Economic Development Association, all of whom offered enthusiastic support as plans took shape.

The mill is now being transformed into 141 affordable senior apartments, including HUD 202 PRAC-subsidized homes for adults 62 and older, designed to provide safe, accessible housing with essential onsite support. Community partnerships continue to guide the project, ensuring the development addresses a critical housing need while honoring the site’s historic legacy.

“We have partnered with Givens for over three years working on the senior housing project in Clinchfield. Teresa and Andrew have been great partners... McDowell County suffers from a serious housing shortage, especially for senior citizens. The 141 units will greatly help with this challenge.”

– **Chuck Abernathy, McDowell**
Economic Development Association



EXPANDING OPPORTUNITY

Givens Webster Village

Givens Affordable Communities is also entering a bold new chapter with Givens Webster Village—an innovative intergenerational community made possible by a **\$10.3 million HUD award** and strong regional collaboration. The project will bring 120 affordable homes for seniors to Jackson County within a mixed-income neighborhood featuring workforce housing, childcare, and essential

services. With construction expected to begin in 2026, generous gifts and grants will help close the remaining funding gap.

Your support of Givens Affordable Communities helps transform possibility into place—creating homes where older adults can age with dignity, connection, and hope for generations to come.



Dogwood Health Trust is a philanthropic foundation dedicated to improving the health and wellbeing of WNC by expanding access to housing, healthcare, and supportive services—work that closely aligns with the mission of the Givens Communities. We are deeply grateful for their partnership and shared commitment to creating communities where every older adult can age with dignity, connection, and stability.

OUTREACH & AFFORDABLE COMMUNITIES

GIVENS COMMUNITY IMPACT

Extending Care Into the Community

Givens Community Impact (formerly Givens LifeMinistries) strengthens wellness and stability for underserved and vulnerable populations by expanding access to essential services—food assistance, quality nursing support, prescription assistance, chronic-disease self-management, wellness education, and emergency or preventive-care grants. Under the leadership of Joey Abel, Director of Community Impact, outreach is now fully integrated into the work of the Givens Foundation—elevating Community Impact as a core fundraising priority and strengthening our ability to extend care beyond campus walls.

A clear example of this impact is the **Charlie Cart Project**, a mobile teaching kitchen that supports residents at Givens Gerber Park and affordable communities across the region. Each month, the Charlie Cart engages 40–50 participants in hands-on demonstrations that build confidence in preparing healthy, budget-friendly meals. Philanthropic support—including funding for a critical electric winch—allows staff to safely transport the cart between communities, broadening its reach.

Partnerships such as the collaboration with MANNA FoodBank provide fresh ingredients for cooking sessions, helping residents turn pantry staples into practical, nourishing meals. As Supportive Services Manager Lisa Rogers shares, “Being able to reach residents in this way has

been important in positively impacting both Givens affordable communities and the greater community.”

Initiatives like the Charlie Cart and the broader Givens Affordable Communities expansion strengthen community wellness—one household, one skill, and one shared meal at a time. When you give to Givens Community Impact, you extend compassion beyond campus walls, helping neighbors access nourishment, tools for wellness, and the stability they deserve.



LIFE ENRICHMENT

LUV2QUILT & LIFE ENRICHMENT

Resident Passion In Action

Givens Life Enrichment nurtures wellbeing by creating opportunities for personal enrichment, wellness, and connection through capital investments, programs, resources, and partnerships. These efforts enhance spiritual life, arts and culture, wellness programming, shared spaces, and resident-led initiatives including art studios, lifelong learning, outdoor recreation, and creative workshops.

A powerful example is Luv2Quilt, one of seven fiber-arts groups supported by Life Enrichment. Its roots trace back to the Stitches from the Heart sewing group, founded by resident Beth Waller. Luv2Quilt was launched in 2021 by resident Joanie McGee, blossoming into a vibrant philanthropic effort serving both Givens residents and the broader Asheville community.

Luv2Quilt members create handcrafted bed runners, walker totes, and other items for residents in the Health Care Center. They also partner with regional organizations—BEAR

Closets, BeLoved Asheville, MANNA Foodbank, Four Seasons Hospice, and others—donating quilts, stuffed animals, baby items, prayer shawls, home-warming gifts, and more.

The group meets regularly, with around **20 residents contributing over 775 service hours each year**. Members describe Luv2Quilt as a

meaningful source of connection and purpose:

“It gives us an opportunity to meet others with similar interests, donate quilts to ill children, and participate in fundraising activities.”

Philanthropic support provides essential resources, including sewing machines, materials, and maintenance, allowing the group to sustain its meaningful outreach.

By supporting Life Enrichment, donors help fuel creativity, connection, and purpose—ensuring residents continue to lead, serve, and enrich the community through their passions.



FUTURE AND INNOVATION

Investing In Possibility

Givens Future and Innovation embodies Givens Communities' dedication to transforming bold ideas into meaningful opportunities that redefine aging and enhance quality of life. Through strategic investments in new development, capital improvements, technology, sustainability, expanded health services, and mission-driven programs, the fund helps create environments where residents can thrive both now and in the years ahead. Its initiatives span environmental stewardship, health and wellness, education, entrepreneurship, and programs that protect, support, and empower those who call Givens home—strengthening resilience and driving long-term impact across all dimensions of aging well.

Current efforts highlight this commitment. A major priority has been building a strengthened technology infrastructure that increases scalability, stability, and efficiency across resident services, healthcare systems, and business operations. The transition to secure cloud-based platforms has improved data reliability and elevated patient care. This investment proved invaluable during Hurricane Helene, when widespread regional outages occurred; thanks to a resilient network, Givens maintained critical onsite communication, enabling teams to coordinate effectively and restore connectivity more quickly.

Technology advancements are also improving resident safety. A robust infrastructure now supports enhanced access control, vehicle and visitor identification, improved tracking across



Independent Living and the Health Care Center, and systems such as wander management, campus-wide door access, pull-cord alerts, and integrated security cameras.

Looking ahead, Givens is developing an in-home technology package for residents at all levels of care, including Givens Home First and Givens Choice. Designed to support aging in place, it will address social connection, proactive health monitoring, home automation, and overall quality of life.

By investing in Givens Future and Innovation, donors help shape a bold, inclusive future—bringing tomorrow's possibilities to life today.

GIVENS GROWS



Meeting Urgent Needs *with* Compassion and Flexibility

Givens Grows provides unrestricted support that allows Givens Communities to respond quickly to areas of greatest need, opportunity, or urgency. This includes crisis support, campus emergencies, special projects, and outreach efforts that ensure residents and team members receive timely, compassionate assistance during unexpected challenges.

A recent example of this impact can be seen in the uncertainty surrounding SNAP benefits for residents at Givens Gerber Park and Givens Great Laurels. When delays created stress and concern around affording groceries, Givens Philanthropy stepped in immediately.

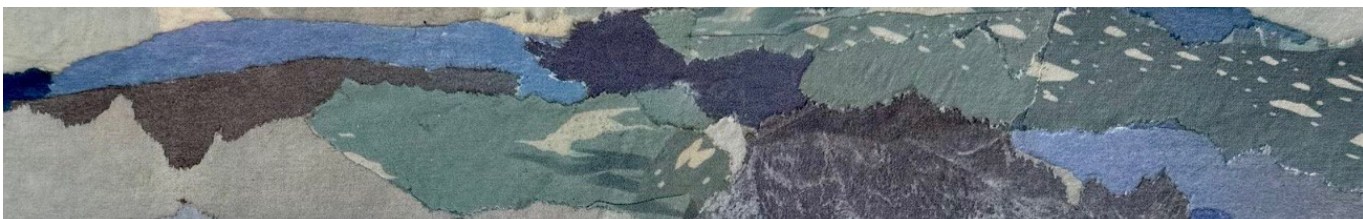
Through generous philanthropic support, grocery gift cards were provided to ease the burden of rising food costs. This swift response was made possible thanks to the advocacy of Teresa Stephens, Vice President of Affordable Communities, whose leadership ensured that residents received support quickly and with dignity.

We also extend gratitude to BeLoved Asheville, whose generous contribution of additional grocery gift cards amplified the effort and offered comfort and hope.

Residents expressed heartfelt appreciation, with one sharing:

“I began to tear up when I received the financial support... Receiving these grocery gift cards was a huge blessing.”

Your gift to Givens Grows puts critical resources where they are needed most, when they are needed most.



Legacy Circle

The Givens Foundation is pleased to introduce the Givens Legacy Circle, created to honor individuals who have chosen to include Givens in their estate plans. These planned gifts reflect a shared commitment to compassion, connection, and purpose. Legacy Circle members help ensure that future residents and team members experience the same care, dignity, and opportunity that define Givens today.

LEGACY CIRCLE MEMBERS

Anonymous	Burnham		
Larry Ammons	Mary Calhoun		
Ed & Becky Anderson	William & Theoleen Cannon		
William & Kathryn Anderson	Day & Blanche Carper		
Martha Avett	Audrie Celley		
George Baker	Sam & Clara Childs		
Anonymous	Thayer & Mamie Church		
Sara Barney	John Cieszko	David & Mary Franks	Chester & Annie Pool Helgoth
Margaret A. Bealmear	Stephanie Coleman	Brice & Thelma Gambill	Robert & Lucille Helwig
Harold & Margaret Beaumont	Roger Congdon	Martha Game	Grayce Henry
Robert Bebb	Reginald & Carolyn Cooke	Sherron Geiger	Donald Hood
Donald & Louisa Bender	Anonymous	Norman & Myrle Gengler	Kenneth & Elizabeth Hood
John & Marilyn Bergman	Mabel Corpening	Katherine Gettman	Margaret Horner
Charlotte Lunsford Berry	Mary Virginia Cowan	Hazel Gilbert	Barbara Howard
Victor Berry	Oliver & Eugenia Cross	Mary Alice Gleason	Sue Howell
Wesley Bessel	Eddie & Betty Dalton	Woodrow & Hazel Greene	Mary Louise Hunley
Mary Bethea	Thomas & Ruth Davis	Lorraine Gribbens	Frank & Elizabeth Hyde
Reeve & Lila Betts	Margaret Annora Day	Greely & Lucile Griffin	Evan & Anna Jenkins
Samuel Bittner	William & Marion Depp	Doris Haddock	Joseph & Celeste Jenkins
Embree Blackard	Jane Dewar	Fred Hale	Louise Johnson
Robert & Jean Bolinder	Sara Dixon	Theodore & Elizabeth Hallenbeck	Will & Carlotta Jordan
Eleanor Bond	David & Judy Doob	Pat Hankinson	Sally Jeanne Kappler
Lynne Boone	Tom & Eleanor Duffy	Ed & Byrniece Hansbrough	Lynn Eddy & Don Kessler
Pauline Brawley	Fletcher Dunbar	Elton & Aline Hansens	Reverends Raymond & Marjory Kiess
Jere & Elizabeth Bristle	Alfred & Agnita Dupree	James & Evelyn Hanson	Allen Kirk
Evelyn Brookshire	Raymond & Iva Endicott	Nell Harden	Theodore & Ruth Kirk
Eleanore Brown	Helen Eshelman	Edward & Susan Hardin	Leslie Kobik
Melvin Buller	Anonymous	Thornton & Evelyn Hawkins	Buddy & Mary Kyles
George & Amber	William & Susan Fox	Malcolm & Nan Hayes	Kenneth & Marian LaRowe

Please note: this list does not yet include planned gifts to Givens Aldersgate.

A Legacy of Generosity • Founded in Community

Elmer & Beverly Lee	Richard Mueller	Clifford & Lois Scott	Joe & Mary Van Sickle
Eric & Connie Lincke	Horwood & Francelle Myers	Henry Sechrist	Donald & Anne Watrous
William Locke	John Nieburg	George & Polly Shimrak	Blanche Weaver
Karla Longree	Donald & Doris Novy	Frances Slack	Thomas & Gene West
Everett & Reba Lowman	Mary Nyland	Bretney & Coleman Smith	Ray & Katherine Whatley
Edward & Alvera Luss	Virginia O'Shaughnessy	Ethel Smith	Francis & Clara Whitehead
Anonymous	Kathleen Pacetti	Frances Smith	Paula Whittaker
Johnnie Manwaring	Gene Parks	Ruth Smith	Hubert & Joan Williams
Mortimer & Betty Marks	Martha Patterson	Constance Spangenberg	Elizabeth Wilson
Glenn & Dorothy Marlow	George & Bessie Philpot	Hal & Alberta Starnes	Eric & Katherine Wilson
Margaret McClelland	Bill & Betty Richardson	Lois Steedle	Mary Wilson
Doris McCleskey	Therman & Christine Richie	Robert & Marilyn Stubbs	Joseph Winkler
Walter & Kay McGuire	Bill & Joetta Rinehart	Letha Sutton	Richard Wood
Donald & Alice McLennan	Ernest Rosenau	Sylvia Swink	Forest & Frances Wright
Richard & Lois Mershon	Martha Rowlett	Doris Thibodeau	K. Lee & Harry Wright
Ron Mitchell	Bertha Rymer	Paul & Edna Thompson	Greta Yager
Bonnie Louise Moore	Philip & Louise Sales	John & Phyllis Titmus	Sandee Yost
Francis & Janice Morris	Ruth Schultz	Esther Toreson	Anonymous
Beulah Moses		Walter & Nancy Trapp	Norman & Barbara Young

If you have included Givens in your estate plans, please let us know. We welcome the opportunity to honor your generosity in a way that is meaningful to you and ensure your gift reflects the causes closest to your heart.

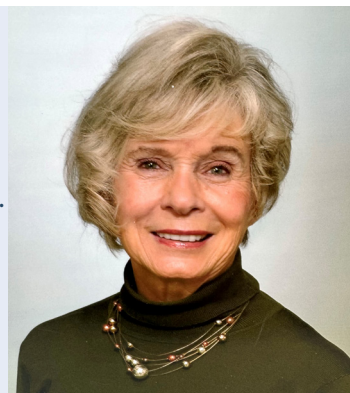
A Gift for the Community Called Home

For **Becky Anderson**, being part of the Givens Legacy Circle honors a lifelong relationship. She calls it “the wind behind my back,” a place where she has always felt supported. For Becky, Givens is more than a place to live. “You can feel that they’re looking out for you,” she says. “Not just for today, but for tomorrow.”

Becky’s commitment to Givens is rooted in deep gratitude. When her husband was living with Alzheimer’s, Givens Estates became a sanctuary of compassion. Her children saw the relief that Givens’ care brought their family. Knowing that he was safe allowed them to continue their careers without the heartbreaking worry so many families face.

That experience changed all of them. When Becky decided to make a planned gift, her children celebrated it as a way to honor a kindness that could never be fully repaid. Today, Becky sees her planned gift as a way to ensure that future families experience the same quality care her family received.

Residents who love Givens can create their own planned gift by becoming part of the Legacy Circle. Every gift, large or small, helps ensure that the same extraordinary care continues for generations.





Endowments

For more than three decades, over 500 donors have invested in the endowment funds listed below. These gifts grow in perpetuity—sustaining compassion, advancing opportunity, and ensuring that the care, dignity, and sense of belonging that define Givens Communities will flourish for generations to come.

RESIDENT ASSISTANCE ENDOWMENTS

Mr. and Mrs. Donald A. Bender
Dr. and Mrs. Embree H. Blackard
Conrad and Fox Families
Divelbiss Family
Sherron Geiger
Woodrow “Red” and Hazel Greene
Mr. and Mrs. Greely L. Griffin
James H. and Evelyn R. Hanson
Mr. and Mrs. Kenneth La Rowe
William Bruce Laughridge
Mr. and Mrs. Wilfred G. McLennan Family
Richard P. Mueller Family
Horwood P. and Franchelle S. Myers
John T. Nieburg
Donald and Doris Novy Family
Virginia O’Shaughnessy
Ruth Paddison
Joseph E. Parks Family
Bill and Betty Richardson

Bill and Joetta Rinehart
Sales Family
Smith-Childs Family
Katherine G. and Ray E. Whatley
Hubert W. and Joan B. Williams
J. Garland and Kathryn Winkler

ENRICHING LIVES ENDOWMENTS

Martha H. Avett - Music Endowment
Harriet Bennett Sacred Music Endowment
Dr. Elaine D. Brummett - Healthy Dining Endowment
Melvin C. Buller - Flagpoles and Wildflower Meadows
Campus Preservation Endowment - Trails, Trees, and Campus Signs
Stephanie M. Coleman - Landscape
The Helgoth Fund - Givens Grows Unrestricted
Dr. Karla Longree - Music Appreciation
Mr. and Mrs. Richard E- Mershon - Bus Replacement



Enduring Impact Lasting Opportunity

John T. Nieburg - Internship Assistance

John T. Nieburg - Team Member Assistance

Virginia O'Shaughnessy - Accessible
Bus Replacement

Virginia O'Shaughnessy - Grand Pianos
Maintenance and Replacement

K. W. Partin Family - Landscape Beautification

Donald and Evelyn Price Library Endowment

Austin and Arlene Rising - Givens Grows
Unrestricted

Mimi and Bill Rouse Memorial Garden

Bertha S. Rymer - Library and Media Center

Hubert W. and Joan B. Williams - Horace E. Bell
Memorial Garden

Hubert W. and Joan B. Williams - Outreach
Endowment

Hubert W. and Joan B. Williams - Vision
Endowment Fund

*Please note that this list does not include Givens
Aldersgate endowments.*



Givens FOUNDATION

CARE. SERVE. ENRICH. GIVE.

Imagine, dream and plan the possibilities with us.



**Let's shape the future of
Givens Communities, together.**

There are many opportunities, first and foremost, to enrich the quality of life at Givens Communities. Building a foundation for possibilities also offers exciting ways to benefit the lives of others throughout Givens Communities and Western North Carolina.

Please make a gift today.

Creative GIVING OPTIONS

- Planned gifts
- Gifts of stock or investments
- In-kind donations or vehicles

BY MAIL

ONLINE

2360 Sweeten Creek Rd. (one-time or monthly)
Asheville, NC 28803 givensphilanthropy.org



Amy Renigar, Director of Philanthropy
(828) 669-6474
arenigar@givenscommunities.org

.....
*We are grateful for you and all the people
who make our communities a place where the
possibilities for aging are abundant.*



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OUR VISION
Endless Possibilities
Vibrant Aging

OUR MISSION
Creating Community
Empowering Lives

This vision includes the residents
within our Givens Communities
organization and the broader
population of Western
North Carolina.



*Imagine,
dream
and plan
the possibilities
with us.*

Givens Estates, Inc. (dba Givens Communities) is a non-profit 501(c)(3) organization. Contributions are tax deductible to the extent allowed by law.

The Creative Spirit of Community

Together, artists from across Givens Communities offer more than visual beauty—they share pieces of their lives, passions, and perspectives. Their artwork reflects the richness of experience that defines our community, where residents explore lifelong talents, discover new creative paths, and build meaningful connections through shared expression. Creativity at Givens is not simply an individual pursuit; it is something nurtured in relationship—with neighbors, with place, and with purpose.

The artwork featured throughout this report is by Givens residents Joan Francis Taylor, Tina Stauber, Marge Campana, and Barbara Applebaum, each inspired by the people and surroundings that shape their daily lives. Their work is a testament to the vibrant, connected spirit of Givens Communities and to the stories we continue to create together.

