



The Sequoia Society honors, recognizes, and celebrates members of our generous donor family who have included Casa Dorinda in their estate plans.

Over the years, Casa Dorinda has been fortunate to receive a number of estate gifts that have furthered our mission, strengthened our community, and supported our staff.

## Russell & Suzanne Bock...*Their bequest has made a lasting difference in the lives of Casa residents in need.*



The Bocks were residents of Casa Dorinda for 15-25 years, and set up a legacy to help Casa Dorinda residents who have outlived their financial resources. Their gift, along with many others, has helped the “Resident Benevolent Care Fund” grow and remain strong. Residents who benefit from this fund are grateful to know they will always have a home at Casa Dorinda.

## Nico March & Lucille Mayer... *“Charity begins at home.”*



“We discovered the meaning of ‘philanthropy’ in our lives when Casa became our home. When we saw that previous residents donated funds to create the Medical Center that stands today, it changed our attitude towards philanthropy. Investing in a project like the new Center for Personal and Memory Care or giving to the Employee Emergency Fund allows us to see first-hand

what our donations can accomplish and how they improve our community. Now it’s our turn to leave a legacy gift to Casa through our IRA so that future residents will benefit the way we did from our predecessors. It feels wonderful to give to Casa Dorinda and witness the results of making a positive impact.”  
– Nico March & Lucille Mayer

*By leaving a legacy gift to our community, you can make a difference for future generations and share the power and joy of living generously.*

## Your Legacy, Your Impact

How do you want your future gift to make a difference? Support the fund(s) that are most meaningful to you:

- ◆ Community Enhancement - Special purpose gifts that benefit a specific area or program on campus such as the Medical Center or Life Enrichment.
- ◆ Employee Support - Scholarship, Emergency or Appreciation Fund - leave a gift to support Casa staff.
- ◆ Endowment - Gifts are invested and earnings from the principal can be used for extraordinary projects.
- ◆ Resident Benevolent Care - Provide financial assistance for residents who have outlived their financial resources.
- ◆ Unrestricted Gift - Give to where the need is greatest.

## We Invite You to Join Us

The Sequoia Society is our way of acknowledging your commitment to Casa’s future – today. Becoming a member is simple. Include Casa Dorinda as a beneficiary of a gift from your estate and notify us of your plan. We’ll add your name to our growing list of members in honor of your dedication to our mission. It is our promise to steward your charitable gift and carry your legacy forward as you envision it.

Please contact Lisa Thomas, Director of Philanthropy, at [lthomas@casadorinda.org](mailto:lthomas@casadorinda.org) or call 805.969.8070 to learn more about the Sequoia Society.

PHILANTHROPY AT CASA 

WHAT WE DO FOR OTHERS LIVES ON



We strive to enhance the quality of life of all Casa family members so they continue to live their lives with dignity, security, and as independently and fully as possible.

## Membership Benefits

- ◆ Attendance and recognition at the Annual Sequoia Society Dinner and other Special Events
- ◆ Recognition on the publicly displayed Sequoia Society Plaque
- ◆ Participation in the Sequoia Society Tree Celebration on campus
- ◆ Recognition in Casa Dorinda's Philanthropy Impact Report
- ◆ Satisfaction of knowing your legacy lives on, and will benefit Casa Dorinda, residents, and staff in the future

## Ways to Leave a Legacy

**Bequests:** A gift through your will or trust (an asset, dollar amount, percentage or remainder of your estate).

**Life Insurance Policy:** You may designate Casa as the beneficiary and/or owner of an existing policy.

**Life Income Gift:** Charitable Remainder Trusts and Charitable Gift Annuities offer an immediate income tax deduction and lifetime income payments.

**Retirement Plans:** Name Casa as the beneficiary of your IRA or other retirement assets. These are excellent assets to give to charity because they are fully taxable if left to heirs.



Casa Dorinda is a private LifeCare CCRC community owned and operated by the Montecito Retirement Association, a nonsectarian, nonprofit, tax-exempt organization. State of California Licenses RCFE #421700160, SNF #050000112, CCRC Certificate of Authority #126.



## Our Mission

Casa Dorinda's philanthropic mission is to enhance the lives of residents, improve our campus, bolster our financial strength, and support our employees.

Casa Dorinda is committed to ensuring our Life Care program operates with a commitment to excellence throughout all levels of service and care.