

PHILANTHROPY AT
Casa Dorinda



WHAT WE DO FOR OTHERS LIVES ON

History of Philanthropy

Casa Dorinda was established as a non-profit community in 1983 by the Montecito Retirement Association's Board of Directors. Because of Casa's tax-exempt status, and the generous giving of our residents, there have been many successful philanthropic endeavors that have significantly enhanced our campus, and the lives of our residents and staff.

- The Medical Center was built through a resident-led philanthropic effort in the 1990s.
- The Casa Scholarship Fund was established in the 1990s, and has awarded scholarships to employees and their families every year since.
- The resident-led Legacy Campaign was launched in 2016 and raised more than \$9 million. The funds were directed to Casa's new Center for Personal and Memory Care which opened in 2021.



MEDICAL CENTER



CASA SCHOLARSHIP FUND



CENTER FOR PERSONAL & MEMORY CARE

Our Philanthropic Mission

Our philanthropic mission is to enrich the lives of our residents and staff, enhance our campus, and strengthen our financial foundation. Residents are passionate about their "home" and the Casa family. We are grateful for the partnership we have with our residents who invest their time, talent, and resources, making our community a place unlike any other in the nation!

Charitable Giving Opportunities

COMMUNITY ENHANCEMENT FUND

Contribute a restricted gift towards special equipment or specific departments, unique programming, senior care innovations, and other creative opportunities that enhance campus life.

UNRESTRICTED GIFT

Unrestricted gifts further Casa Dorinda's mission and will be directed to where the need is greatest.

ENDOWMENT FUND

The funds are invested with the principal remaining untouched. The earnings may be used for extraordinary expenditures approved by the MRA Board for Casa Dorinda facilities (buildings, grounds & equipment) that will significantly enrich the lives of current and/or future Casa Dorinda residents.

RESIDENT BENEVOLENT CARE

Provides financial assistance for residents who have outlived their financial resources, and ensures they will always have a home at Casa.

RESIDENT-DRIVEN EMPLOYEE SUPPORT FUNDS

Scholarship Fund: Provides financial assistance to Casa employees and family members who want to further their education. The average annual scholarship ranges between \$2,500 - \$7,500.

Employee Emergency Fund (EEF): Provides financial assistance for employees for unexpected emergencies. Employees can request up to \$5,000.

Employee Appreciation Fund: Express your gratitude to the wonderful employees of Casa Dorinda who provide exceptional care and service to residents. Contributions can be made year-round, and are distributed to our employees (excluding Directors) during the Holiday Season. *Contributions to this fund are not tax-deductible.*



SEQUOIA SOCIETY - PLANNED GIVING

The Sequoia Society is Casa Dorinda's Planned Giving Program, which honors and recognizes members of our donor family who have included Casa Dorinda in their estate plans. Donors can designate their future gift to the fund of their choice.

TO LEARN MORE ABOUT CASA'S MISSION
AND HOW TO PARTNER WITH US, PLEASE CONTACT:

Lisa Thomas, Casa Dorinda's Director of Philanthropy
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Ways to Give

CURRENT GIFTS

Cash
Donor Advised Funds
Stocks
Bonds
Real Estate
Matching Gifts
Life Insurance
Charitable IRA Rollovers
Fine Art
Vehicles

FUTURE COMMITMENTS

Bequest under Wills/Trusts
Pledges
Charitable Gift Annuities
Charitable Remainder Trusts
Charitable Lead Trusts
IRA Beneficiary Designations
Life Insurance
Real Estate
Fine Art

How to Give

One-Time Gift

Multi-Year Pledge

Monthly Gift through your Casa Statement

Planned Gift (Sequoia Society)



805.969.8070 | www.casadorindagift.org

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