



Lenbrook

Fiscal Year 2025

Annual Report



Here you can.

Here you can.

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Letter from the President & CEO

More than 40 years ago, Atlanta businessman Jack Clark set out to create a place “good enough for his mom.” His vision was simple yet profound: a premier community, in the heart of Atlanta, where people could enjoy an enriched lifestyle, strong sense of belonging, and the confidence of exceptional healthcare. From that vision, Lenbrook was established as Atlanta’s first purpose-built, not-for-profit Life Plan Community – created to serve people rather than profit and to sustain a legacy of quality and purpose for generations to come. The founding principles continue to define Lenbrook today.

Lenbrook is a place where connection in community and a high-quality lifestyle flourish together. It offers residents and associates opportunities to discover what matters most to them, be vibrant, and build lasting, meaningful connections along the way.

This year, we honored that legacy by refreshing our mission statement. Our board of directors, resident leaders, and management set out to craft a statement that was active, inspiring, and inclusive of all stakeholder groups. A message that more fully reflects who we are today and what we want our purpose to be going forward. This updated mission doesn’t change our purpose. It *clarifies* it.

Our refined mission invites us **to engage together every day, nurturing an exceptional community where individuals can pursue connection, well-being, and fulfillment.**

A mission statement isn't just words on a wall. It's our North Star — our shared direction — that brings residents and associates together around a common goal. It strengthens the connection between people and purpose that drives Lenbrook's programs and decisions — shaped by residents, guided by management, and championed by associates. Our mission inspires and grounds us in a world that's constantly evolving.

This report highlights the many ways purpose comes to life at Lenbrook — in the friendships and stories that **connect us**, the programs and amenities that help residents **live well**, the opportunities for learning, giving, and belonging that **bring fulfillment** each day. These three pillars and our **standard of excellence** define the

Lenbrook *Difference*, which powers our vision to be the most desirable senior living community in the Southeast.

As we reflect on this extraordinary year, I am filled with gratitude for everyone who brings purpose to Lenbrook. Together, we honor Jack Clark's vision and remain committed to the founding principles that will continue to serve as the solid foundation toward a vibrant future of lasting relevance for our stakeholders.

Here you can.



Chris Keysor
President & CEO





Letter from the Residents Association President

What truly makes Lenbrook an exceptional place goes beyond its beautifully maintained spaces and top-tier services. At its core, Lenbrook stands out due to its unwavering commitment to excellence, its vibrant community, and its profound respect for the people it serves. Whether you're considering joining our community or supporting our mission, I want to share what makes Lenbrook such an extraordinary place to live and work.

Lenbrook creates an environment where residents and associates feel not only safe and supported, but empowered to thrive. It's a place where every

individual is treated with dignity, and where lifelong learning, wellness, and connection are not just offered — they're celebrated.

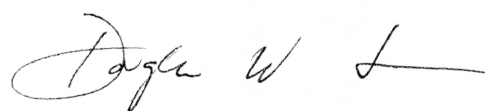
Every day, our associates bring heart and skill to their work, knowing they're not just doing a job, but making a meaningful difference. Lenbrook's leadership has established a culture rooted in respect, innovation, and a genuine commitment to enhancing lives. Residents add their voices to community decisions, collaborating with associates and leadership in a shared sense of purpose. Together, we create a community where every interaction reflects our mission.

Lenbrook's residents are welcoming, caring, and interesting. It's a joy to dine together and learn about others' backgrounds, and many find common interests. You can feel it in every interaction — there's a genuine sense of belonging that makes Lenbrook more than just a place to live. It's a place to call home.

Lenbrook represents a mission worth investing in. With your support, we're able to expand programs that enrich lives, improve wellness, and foster

connection for current and future residents. Every contribution of time, resources, or connection strengthens the legacy of quality, compassion, and community that defines Lenbrook.

Together, we are building a future where aging is not only honored but celebrated.



Doug Johnson
2024-2025 Residents
Association President

Residents Council

Executive Committee

Doug Johnson, President
Gaby Adriaenssens,
Immediate Past President
Margaret Kleiman, President-Elect
Helen Prieto, Secretary
Dave Dimling, Treasurer

Members-at-Large

Hilary Ford
Charles Ginden
Travis Halford
Barbara Neuman
Marianna Patterson
Ethan Staats

Resident Committee Chairs

Associate Appreciation: Cassandra Manley
Building, Grounds & Safety: Margo Dexter
Dining Services: Gail Ripans
Excursions: Kathy Glenn
Friends of the Arts: Mary Jo Sibbald
Health & Wellness: Michael Johns
Housekeeping: Barbara Conway
Library: Barbara DiSalvo
New Residents: Libba Wight
Programs & Events: Gaby Adriaenssens
Spotlight Editor: Kay Rogers

At its heart, our mission comes down to a simple promise: *Here you can.*

This promise reminds us that Lenbrook encourages and empowers everyone to:

Connect with others in ways that matter.

Be fulfilled with opportunities to grow, contribute, and thrive.

Live well through service, care, and support.

These ideals guide our standard of **excellence** in all we do together.

The following pages show Lenbrook's mission in action, highlighting the people, events, and milestones that defined a year of joy, vitality, and generosity.

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“The people who have chosen Lenbrook are all interesting...with many different backgrounds and experiences. This always leads to fascinating conversations. Associates couldn't be more friendly and supportive...learning our names and preferences quickly. My almost 12 years here have been wonderful.”

—Anne H., Lenbrook Resident



Here you can ... *Connect.*

Connection is essential to living fully: research shows that social engagement supports longevity, cognitive health, and happiness. At Lenbrook, every smile, shared meal, and conversation affirms that truth daily.

Rooted in a welcoming culture, intentional design, and engaging programs, the Lenbrook community thrives on relationships and shared learning, where well-being flourishes and our mission comes vividly to life.

FY 2025 marked the formation of a **centralized transportation team** to enhance the resident experience when utilizing our hospitality programs of valet, limousine, and excursion bus services.

Connection through Design

Lenbrook's spaces are purposefully designed to bring people together. Common spaces that incorporate biophilic design — natural light, greenery, and outdoor views — invite calm and connection. Residents enjoy Happy Hour in The Club, relaxing in the Plaza Gardens, or admiring the restored Aviary. Each space reflects our belief that beauty and nature bring people closer and support our overall well-being.



A Culture of Hospitality

Walk into any Lenbrook space and you'll feel it: neighbors greeting neighbors by name, associates offering genuine help with a smile, and conversations sparking over coffee, concerts, and classes. This everyday hospitality reflects The Lenbrook Way — being caring, competent, and responsive, and maintaining a beautiful environment where connection thrives.

In FY 2025, the Enrichment team organized more than **3,000 programs, events, and activities** — Bridge and Mahjong, lectures, concerts, fitness classes, excursions, live band dances, spiritual gatherings, and more — offering residents a robust and broad variety of opportunities to connect and learn together.

The **40th Anniversary Celebration** in late 2024 brought residents, associates, and families together to honor four decades of community and innovation.

Seasonal festivals — from **Fall Festival** with “**Llamas at Lenbrook**” to the **Spring Festival** welcoming baby goats — invited laughter and joy to the campus.



Have lots of fun. Be the difference. Provide leadership.

Creative events like the **1920s and Royal Wedding Murder Mystery Dinners** reminded everyone that play and imagination are timeless concepts. Associates wrote, directed, and starred in these popular interactive productions.

Beyond the calendar, simple daily gestures — holding a door, remembering a favorite dessert, or checking in after a doctor's appointment — continued to knit together the larger story of Lenbrook.

People Make the Difference

Residents often say the best part of Lenbrook is the associates who make living here feel like home. Associates embody The Lenbrook Way, our culture of hospitality, and credit the welcoming and appreciative atmosphere for making their work meaningful from the first time they put on their Lenbrook name tag. Residents reinforce this connection daily, respecting associates for their care and professionalism and expressing gratitude through our **RITE Rewards program** and our annual **Associate Appreciation Celebration**.



Together, residents, associates, and families create a community where friendships and belonging flourish.

Here you can ... Live Well.

Living well at Lenbrook means having many opportunities to thrive in body, mind, and spirit. In FY 2025, Lenbrook continued to strengthen the programs, partnerships, and amenities that empower residents to live their best lives.

Quality Health Services for Peace of Mind

Living well begins with feeling secure in your care. Lenbrook's full continuum of on-site healthcare includes The Clinic serving Independent Living, in-home care through *Menders by Lenbrook*, an Assisted Living Center, and a Health Care Center rated five stars by the Centers for Medicare & Medicaid Services, offering

“

“Lenbrook is a wonderful place to live. It has many things to keep all of us happy and healthy, both in mind and body.”

*—Babette R.,
Lenbrook Resident*

Medicare-certified rehabilitation services, memory care, and long-term care. Lenbrook also partners with **Emory Integrated Memory Care (IMC)** to provide specialized, dementia-sensitive primary care within our community. Residents have peace of mind knowing that exceptional care is always close at hand.



FY 2025 Health Services Achievements:

We invested in key technology and facilities upgrades in Health Services to enhance quality, efficiency, and satisfaction for our stakeholders.

We modernized our healthcare records with a cloud-based system that centralizes data in real time and seamlessly connects with external providers, including labs, radiology, and pharmacies. All departments contributed to this significant initiative to strengthen operations and improve service, investing over 250 hours of training.

As part of our major capital projects, **we refreshed our Health Care Center resident rooms** with new paint, furniture, flooring, and lighting. These touches improve visibility and comfort, creating a sense of safety and well-being.

Comprehensive Wellness for Every Dimension of Life

At Lenbrook, wellness is fundamental to our Enrichment programs that enable residents to live their best lives. Guided by the International Council on Active Aging's Seven Dimensions of Wellness — physical, emotional, intellectual, social, spiritual, environmental, and vocational — our programs foster holistic wellness, balance, vitality, and joy.

In FY 2025, Enrichment launched new offerings such as weekly volleyball and monthly meditation experiences, creating fresh opportunities for movement, mindfulness, and connection.

We invested in our 9,000-square-foot **Fitness Center**, adding new technology to help residents customize their workouts and measure their progress.

Amenities that Make Daily Life Delightful

From 24-hour security and emergency response and valet parking to housekeeping and maintenance, every detail at Lenbrook is designed for convenience and delight. Residents stay active at our Fitness Center and Croquet Lawn, while enriching their minds and discovering new interests in our 4,000+ book Library, Art Studio, and Woodworking Shop.

Dining is a cornerstone of wellness at Lenbrook. Our five venues — and convenient room service — offer hundreds of nutritious options crafted by our chefs and nutritionist. Menus evolve seasonally, featuring locally-sourced ingredients that balance flavor, health, and variety.

Lenbrook maintained its **100% Georgia Health Department rating** across all dining venues for the fourth consecutive year.





In FY 2025 we designed **48 special dining events**, from our entertaining Mystery Dinners and popular Chef's Table series to BBQ's, holiday celebrations and regionally inspired experiences. Dining themes are often accompanied by themed events on our Healthcare floors.



A Week in Dining Services

Chefs prepare an average of **5,425 meals weekly**.

Residents enjoy **50 entrée options** alongside 100+ sides.

Dessert features **30+ rotating dishes**, in addition to eight flavors of ice cream and sorbet (with dairy- and sugar-free options).



Here you can ... Be Fulfilled.

Fulfillment at Lenbrook takes many forms: residents and associates sharing talents and time, serving others, learning something new, or simply brightening someone's day.

Resident Fulfillment: Purpose in Action

A cornerstone of Lenbrook's culture of caring is the Resident Benevolence Fund which supports our not-for-profit status and allows us to fulfill the commitment that no resident will be asked to leave Lenbrook solely due to financial hardship resulting from no fault of their own.

Lenbrook was founded in the heart of Atlanta. In honor of that legacy, residents constantly pursue opportunities to give back the broader Atlanta community.

Resident-Led, Purpose-Driven Initiatives Flourished in FY 2025:

- Filling backpacks with healthy, nutritious food for students at Dresden Elementary through our Backpack Buddies program.
- Knitting caps and blankets for newborns and preemies at Grady Hospital by the Stitch Group.
- Donating books to the Georgia Department of Corrections through the Library Committee.
- Providing gently used items from residents to the Atlanta Mission during the annual Rummage Sale.
- Celebrating the partnership with local police and firefighters at the annual First Responders Luncheon.
- Hosting student interns from Cristo Rey Jesuit High School and The Howard School to provide meaningful experiences in senior living and valuable skills for future success.

*Rely on colleagues. Feel supported. Nurture community.
Celebrate life. Make a difference. Mentor colleagues.*

Residents also shape community life through 11 committees that spark learning, leadership, and friendship. Committees work closely with associates and management to address fun and challenging issues, ensuring residents' voices are heard.

Resident Committees:

Associate Appreciation, Buildings, Grounds & Safety, Dining Services, Excursions, Friends of the Arts, Health & Wellness, Housekeeping, Library, New Residents, Programs & Events and Spotlight.

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“Being in business for 40 years, Lenbrook has learned what its residents want and need to make their life here enriching and fulfilling: from the knowledgeable, helpful and efficient staff, the medical Clinic, the Fitness Center, as well as numerous activities, excursions, and events, you...find yourself right at home.”

—Judy C., Lenbrook Resident





Associate Fulfillment: Purpose at Work

As a leading employer of purpose-driven associates, Lenbrook nurtures fulfillment in every stage of an associate's journey.

Fulfillment begins on day one at **Lenbrook U**, where new associates learn not just policies, but purpose. The two-day onboarding course centers on culture, connection, and compliance. Tenured colleagues mentor new associates to instill the RITE values of Respect, Integrity, Teamwork, and Excellence that make this community exceptional.

Associates who embody these values are celebrated through RITE Rewards, a peer- and

resident-driven recognition program. In FY 2025, colleagues and residents shared **3,690 RITE Rewards** honoring acts that exemplify the RITE values and The Lenbrook Way.

Lenbrook launched **new leadership development initiatives** to mentor up-and-coming talent from diverse backgrounds. We continued our Licensed Practical Nurse to Registered Nurse pathway to support healthcare professionals and address a critical need for their skilled compassionate care.

Our commitment to growth and opportunity is reflected in the **17 associates who earned promotions** during the fiscal year.

Resident-Driven Philanthropy

Resident-driven philanthropy supports associates both in times of personal hardship and in pursuit of their professional aspirations. Through generous community support, two key initiatives make a meaningful difference in the lives of our associates.

The **Associate Education Fund** provides financial scholarships to associates who are committed to furthering their education, have demonstrated strong potential for career advancement, and are driven to achieve excellence.

The **Associate Hardship Fund** offers financial assistance to associates facing severe challenges due to unexpected, catastrophic events that threaten their ability to meet essential living expenses.

Together, these programs exemplify the deep connection between our associates and the community they serve, fostering a culture of compassion and shared purpose.





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“We have lived at Lenbrook for about three years. There are lots of reasons to give it a five-star ranking... The community always seems energetic and operates on a financially sound footing.”

—John D., Lenbrook Resident

Here you can ... Expect Excellence.

Proven Performance and Recognition

Excellence at Lenbrook is more than an aspiration; it's a standard renewed every day. Lenbrook's performance in FY 2025 reflected excellence validated by its peers and partners:

- Ranked by *Newsweek* as #1 in Georgia and #21 in the U.S. in “America's Best Continuing Care Retirement Communities.”
- CARF International Accreditation (since 1992).

- Atlanta's only CARF accredited Life Plan Community.
- Investment-grade rated by Fitch Ratings (since 2016).
- Five-star CMS Medicare and *U.S. News & World Report* ratings, with special recognition for our quality options ranging from inpatient and rehabilitation, memory care, and long-term care.
- Perfect Georgia Health Department dining scores for four consecutive years.
- Novare Awards for Premier and Outstanding Community in Resident Satisfaction and Engagement.



The Lenbrook Way

Excellence lives in the everyday gestures that define The Lenbrook Way. Associates greet residents by name, offer help before it's requested, and hold themselves to the highest standards of professionalism.

Continuous Investment and Innovation

Lenbrook continuously reinvests in our campus and community to maintain our relevance and a lasting sense of pride.

- FY 2025 brought a comprehensive first-floor refresh with new furnishings, lighting, and artwork that reflect Lenbrook's mission and culture. A highlight of the refresh is the custom tapestry celebrating our community's story.
- Lenbrook invested in a new excursion bus to facilitate exciting off-campus adventures.
- We launched new dining venues, including the upscale Phoenix restaurant and a private dining room, Table 83.

For the third consecutive year, Lenbrook sustained occupancy above 95%, a reflection of trust and satisfaction from our residents and their families.



Resident and associate surveys from 2023 - 2025 reflect a common sentiment: Lenbrook is a place where people feel safe, staff are friendly and courteous, and everyone is made to feel welcome.



Letter from the Development Committee Chair

At Lenbrook, generosity is more than a principle; it is part of who we are! Each year, we are inspired by the remarkable spirit of giving that flows through this community. Residents, families, associates, and friends support one another and extend Lenbrook's mission of living well, together. This past year was no exception. Through various charitable endeavors, the Lenbrook community once again demonstrated extraordinary compassion and commitment. Donor support exceeded expectations, enabling us to invest in our people,

care for our neighbors, enrich our community, and strengthen the bonds that make Lenbrook special.

The enduring nature of your support sets Lenbrook apart. We enjoy one of the highest donor participation and retention rates in the country. It is a testament to the deep sense of connection and shared purpose that defines this community. Many of you have also chosen to sustain Lenbrook's mission through our two giving societies, The Legacy and Clark Societies, and joined us to celebrate the installation of our new donor recognition

wall. Your foresight and faith in our future ensure that Lenbrook's spirit of generosity will thrive for generations to come.

To each of you who contributed your time, resources, and heart — thank you. Together, we have created something truly beautiful: a vibrant, caring, and philanthropic community that lifts up everyone it touches.



Sarah Batts
Development Committee Chair



Development Committee 2024 – 2025

Committee Chair, Board Member:

Sarah Batts

Residents Association President:

Doug Johnson

Resident, Associate Education Chair:

Cheryl O'Keeffe

Resident, Resident Benevolence Chair:

Nancy Bedford

Resident, Associate Hardship Chair:

Judy Franz

Resident, Advisory Group Co-Chairs:

Richard Colvin

Gracie Phillips

Board Member:

Huanbiao Mo

Development Officer:

Paige Vohs

Chief Financial Officer:

Leslie Dove

Chief Operating Officer:

Felecia Sveda

President and CEO:

Chris Keysor

Celebrating Generosity and Enriching Lives

Lenbrook's culture of giving made a significant impact in the 2024-2025 fiscal year, supported by 1,071 individual donations, 82% support from residents and senior management, and 100% participation from the Board of Directors. **During the fiscal year that ended on June 30, 2025, Lenbrook received donations of cash gifts and gifts-in-kind totaling \$1,924,751.**



Support from
Residents and Senior
Management



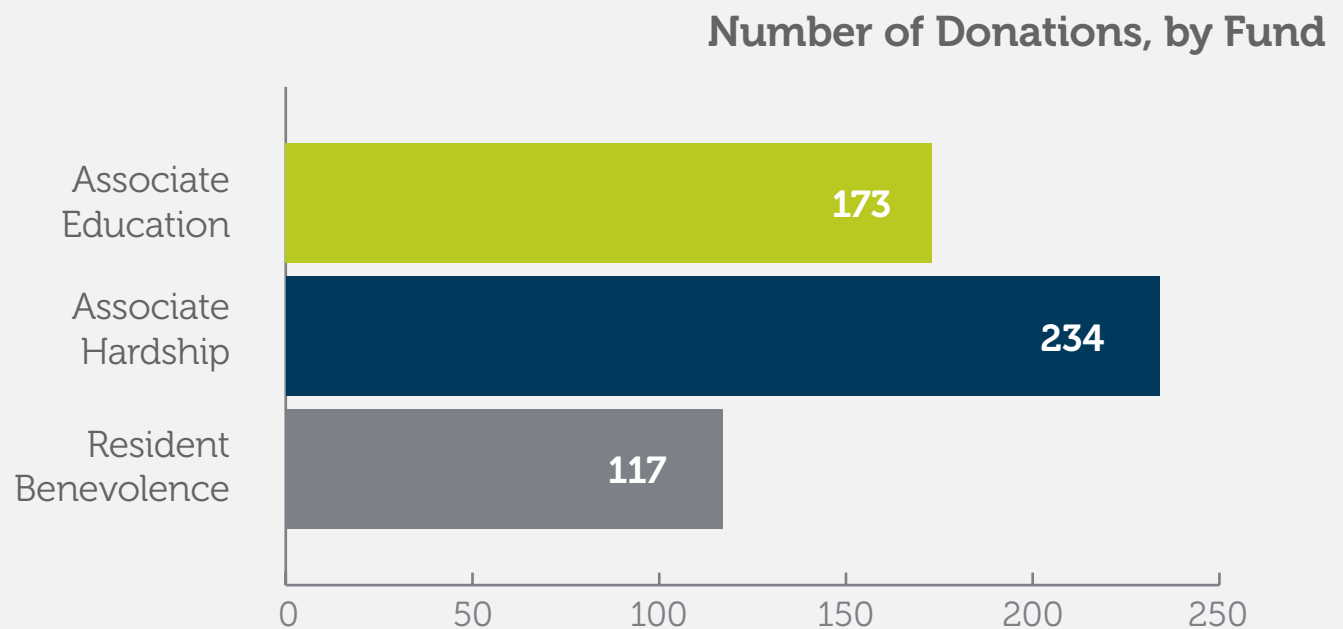
Participation from the
Board of Directors

Donations Received, Fiscal Year end June 30

| Fund | 2025 | 2024 |
|---------------------------|--------------------|------------------|
| Associate Education Fund | \$57,475 | \$48,845 |
| Associate Hardship Fund | 82,757 | 54,295 |
| Resident Benevolence Fund | 49,720 | 48,900 |
| Friends of the Arts | 93,735 | 74,956 |
| Backpack Buddies | 34,135 | 900 |
| Spiritual Wellness | 6,970 | 5,900 |
| Unrestricted | 1,585,389 | 27,284 |
| All Other Funds | 14,570 | 31,312 |
| Total | \$1,924,751 | \$292,392 |

Expenditures, Fiscal Year end June 30

| Fund | 2025 | 2024 |
|---------------------------|-----------|-----------|
| Associate Education Fund | \$62,583 | \$48,709 |
| Associate Hardship Fund | 82,757 | 35,245 |
| Resident Benevolence Fund | 144,266 | 0 |
| Friends of the Arts | 53,033 | 39,432 |
| Backpack Buddies | 13,000 | 12,203 |
| Spiritual Wellness | 4,419 | 13,613 |
| Unrestricted | 280,161 | 7,721 |
| All Other Funds | 800 | 13,066 |
| Total | \$641,019 | \$169,989 |



Empowering Dreams Through Education

This year, the **Associate Education Fund** awarded 19 scholarships, fueling the aspirations of our purpose-driven team members. From a dining server pursuing a degree in mechanical engineering, a CNA earning an RN degree, a supply coordinator studying human and social services, and a concierge associate working towards a healthcare administration degree — each story is a testament to the power of opportunity.

The fund also supports skill-building through certificate programs, helping associates grow in their careers. For example, two healthcare professionals completed certified medical coder training, and a human resources associate earned a data analysis certification from a top program at Emory University — each step forward made possible by generous donor support.

Together, we are not just funding education — we are transforming lives.

“

“I’m deeply grateful to the Associate Education Fund Committee for investing in my professional growth through Kellogg’s Digital Marketing Strategies program. I’m thankful to work in a community that truly values and supports associate development. I’m excited to bring these new insights to my role and contribute even more effectively to our shared goals. Thank you once again for your support and belief in my professional development.”

**—Kristine C., Associate Education
Fund Recipient**

Standing Strong Together

Through nine emergency grants, the **Associate Hardship Fund** provided vital support to associates facing an unexpected crisis — from medical emergencies to urgent car and home repairs, and funeral expenses. These grants are more than just financial support — they are a lifeline, helping our associates stay resilient in the face of challenging times. Each act of support further builds on our shared culture of caring.

The **Resident Benevolence Fund** made a profound difference this year, ensuring that a resident facing financial hardship could remain in the comfort and security of their home. As a not-for-profit organization, we are deeply committed to ensuring that no resident is ever asked to leave due to financial hardship resulting from no fault of their own. This fund reflects the heart of our mission, strengthening our culture where neighbors care for one another and offers dignity, hope, and reassurance that our community stands together in times of need.

Dear Residents (Hardship Fund Committee),

I want to take a moment to sincerely thank you for the support, understanding, and stability you've provided me during one of the most challenging seasons of my life. Working here has not only been a source of income, but also a place of purpose, structure, and growth. During my personal hardships, this job became more than just work. It became a form of healing. I found strength in showing up every day, and that consistency helped keep me grounded when everything else felt uncertain. For that, I am incredibly grateful. I don't take it for granted, and I carry deep appreciation for everyone.

With a grateful Heart,

—Associate Hardship Fund Recipient

A Legacy of Lasting Impact

Lenbrook received an extraordinary and heartfelt estate gift of over \$1.5 million to the Unrestricted Fund from a former resident who lived at Lenbrook for over 20 years. Gifts to this fund empower Lenbrook to respond to the greatest needs of our community, whether enhancing spaces, enriching experiences, or supporting vital services. These donations enabled Lenbrook to expand the scope and amenities of the refurbished dog park and provide customized features to our new excursion bus, creating more joy and connection for residents.

The Spiritual Wellness Fund reflects the deep appreciation residents and families feel for Lenbrook's Chaplains, whose compassionate care and meaningful celebrations of life bring comfort and connection to our community. These contributions enabled Lenbrook to welcome several guest religious speakers throughout the year and to continue our mission of nurturing the spiritual well-being of every resident.

Through the generous support of the **Friends of the Arts**, residents enjoyed inspiring performances and creative programs in the Lenbrook Event Center. Talented artists from the Atlanta community, including Joe Gransden, Julie and David Coucheron, William Ransom, and the Atlanta Opera Studio brought music, culture and delight to the community.

An outpouring of generosity of funds and time to the **Backpack Buddies** initiative made it possible to pack and deliver 9,216 weekend meals to food-insecure school children in the local area, ensuring they had comfort beyond the classroom.

We are deeply grateful for the generous support of our donors, whose contributions reflect a powerful commitment to our mission and community. These gifts make a lasting impact and enrich the lives of our residents and associates, nurturing our exceptional community.

Lenbrook Legacy Society

The Lenbrook Legacy Society recognizes donors who have made planned gifts of \$10,000 or more to Lenbrook. Since its inception nine years ago, the Legacy Society has grown to 48 members. It provides an impactful way to leave a mark in perpetuity, honor a family name, and pay tribute to friends or loved ones.

Gabriella and George Adriaenssens

Genevieve Adsit

Anonymous

Nancy and Charles Bedford

Debbie Bishop

Maude and James Bradford

Judith L. Coe

Barbara and Richard Conway

Frances Curtiss

Mary Virginia and Jarrett Davis

Ann and John Day

Marigene Doyal

Laura and Dan Dornblaser

Elizabeth Feely

Mary Helen and J.T. Ford

Frances and Joseph Fowler

Jacqueline Friedlander

Marty and John Gillin

Joe D. Goodwin

Dorothy Hagerty

Betty and Travis Halford

Joseph Hamilton

Betty and William Hatcher

Pamela and Gene Hayes

Cecile Hooks

Claire and Glen Jackson

Frank Jackson

Chris Keysor

Betsy and Mark Kill

Margaret Kleiman

Jane and Bert Kummel

Ada and Harry Lamon

Cassandra and James Manley

Sara and Paul Manners

Frances and William Nagata

Mary Ann and Godfrey Oakley

Manning Pattillo

Elisabeth Phillips

Gracie Phillips

Stuart Schwarzschild

Joyce and John Stevens

Yeewan and John Stevens

Luellen and Richard Stormont

Felecia and Rocky Sveda

Becky and Dwight Webster

Jennifer and Stephen West

Julie Witt and Michael Halpern

Sophie and Jack Zwecker

Lenbrook Clark Society

The Lenbrook Clark Society recognizes donors who have made current gifts totaling \$10,000 or more to Lenbrook. The Clark Society is named after Jack Clark, who founded Lenbrook in 1983 after being unable to locate a suitable retirement community for his parents, Maude and Paul Clark. From the beginning, Lenbrook was envisioned to be Georgia's first purpose-built Life Plan Community located in the heart of Atlanta. Portraits of Maude and Paul Clark hang in the Lenbrook Board Room today in honor of this great vision.

In FY 2025, Lenbrook welcomed 13 new members to the Clark Society.

Gabriella and George Adriaenssens

Genevieve Adsit

Nancy and Charles Bedford

Margaret and Stephen Bethea

Catherine Binns

Robert Booth

Samuel Buchanan

Richard Colvin

The Compass Group

Barbara and Richard Conway

Lee and Warren Culpepper

Frances Curtiss

James Czyzewski

Lewis Davis

Mary Virginia and Jarett Davis

Ann and John Day

Margo and Greg Dexter

Constance and David Dimling

Barbara DiSalvo

R. Howard Dobbs, Jr. Foundation

Anne and Louis Ederington

Elisa and Robert Ezor

Frances and Joseph Fowler

Ronald Frank

Mary Gilibert

Marty and John Gillin

Charles Ginden

Emily Grigsby

Dorothy Hagerty

Betty and Travis Halford

Anne and Edwin Hansen

Pamela and Gene Hayes

Ellen Hendrix

Martha and Reid Hunter

Paula and Gerard Imlay
Tinsley Irvin
Joyce and Charles Jensen
Judith Jensen
Barbara Johnson
Trina and Michael Johns
Marylin Johnson
Cecile Jones
Chris Keysor
Eleanor Kinsey
Margaret Kleiman
Ada and Harry Lamon
Virginia and Edward Mitchell
Nancy Montgomery
John Nixon
Mary Ann and Godfrey Oakley
Franca Oreffice
Marianna and Solon Patterson

John Pattillo
Manning Pattillo
Martha Pentecost
Elisabeth Phillips
Helen and Eddy Prieto
Patricia Richardson
Babette Rothschild
Ferial Senesen
Joanne Singer
Joyce and John Stevens
Yeewan and John Stevens
Dorothy and Lee Thomas
Betty Van Gerpen
John Weitnauer
Rozelle and James Wesley, Jr.
Dorothy and George Williams



Tribute Gifts in Honor of

Gifts may be made in honor of residents, associates, family and friends. We celebrate our thoughtful donors, and the residents and associates who sparked their support.

Lenbrook Associates

Samuel Buchanan
Sandra Fishman

Merrily Baird

Gail Ripans

Patricia Bowles

Caroline and Marc Heilweil

Claire Cross and Charles Maddrey

Dorothy Byrd
Gail Ripans
Babette Rothschild

Susan Dalton

Bernard Goldstein

David Dimling

Babette Rothschild

Judy Franz

Merrily Baird
Gail Ripans

Marty Gillin

Bernard Goldstein

Bernard Goldstein

Elisabeth Phillips
Babette Rothschild

Meriel Gregory

Gail Ripans

Anne Hansen

Merrily Baird
Bernard Goldstein

Max Hollander

Merrily Baird

Denise Huffman

Margaret Kleiman

Marguerite Ingram

Merrily Baird

Rebecca Jarrell

Margaret Kleiman

Robbye Jarrell

Shirley Cantwell Davis
Bettye Maddox

Joyce and Charles Jensen

Gail Ripans

Melanie Johnson

Bernard Goldstein

Irene Jones

Bernard Goldstein

Nurture community. Celebrate life. Make a difference in friendships. Strengthen skills. Build confidence. Find meaning. Cultivate trust. Gain new friends. Find fun.

Blaine Kelly

Merrily Baird

Margaret Kleiman

Gail Ripans

John Lazlo

Bernard Goldstein

Lenbrook Chaplains

Marlyn Blackwell

Deanna Douthitt

Ruth Kelsey Johnson

Marianne Lee

John Weitnauer, Jr.

Lenbrook Sunday Services

Marianne Lee

Mary Alyce McCullough

Gail Ripans

Starr Millen

Bernard Goldstein

Sarah Pierce

Merrily Baird

Ginny and Alan Plummer

Gail Ripans

Marilyn Prevor

Babette Rothschild

Gail Ripans

Merrily Baird

Babette Rothschild

Bernard Goldstein

Ferial Senesen

Merrily Baird

Mary Jo Sibbald

Gail Ripans

Anthony Smith

Merrily Baird

Carol Teem

Bernard Goldstein

Paige Vohs

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We remember with gratitude those whose lives continue to inspire generosity through gifts made in their memory.

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Financial Summary

In FY 2025, Lenbrook achieved another year of **financial stability**, driven by strong occupancy, effective stewardship of resources, and a continued commitment to its not-for-profit mission. Lenbrook's financial position remains strong, with **\$300M in total assets**, including \$82.6M in unrestricted cash and investments.

Nearly **\$9M was reinvested in capital projects** during the year, including renovations to residences and common areas, replacement of critical equipment, and enhanced technologies. In addition, Lenbrook strategically utilized operating reserves to prepay **\$2.3M in long-term bank debt** in addition to scheduled payments.

Revenues grew to \$54.4M, a 6.0% increase over the prior year, supported by year-to-date average occupancy of 96% in independent living and 95% in assisted living, along with \$1.6M in unrestricted contributions from generous donors. Health Care Center

occupancy declined slightly to 86%, down from 90% the previous year. Expenses before depreciation and amortization rose 3.9%, primarily due to increased workforce costs and inflationary pressures.

Investment income increased 23.9%, which includes interest income and realized and unrealized gains, benefiting from Lenbrook's diversified portfolio and favorable market conditions.

The change in **Net Assets Without Donor Restrictions increased \$3.9M**, exceeding the prior year increase of \$2.3M, further strengthening Lenbrook's long-term financial position.

As Lenbrook looks to the future, we remain committed to our mission of fostering connection, well-being, and fulfillment. With a strong financial foundation, we are **well-positioned to enrich lives and create lasting impact today and for generations to come.**

(M=million)

Statement of Financial Position

Fiscal Year Ended June 30

| Assets | 2025 | 2024 |
|---|----------------------|----------------------|
| Cash and Investments, not limited as to use | \$82,628,796 | \$82,497,853 |
| Current Assets, limited as to use | 13,125,993 | 12,713,488 |
| Other Current Assets | 3,093,101 | 2,307,549 |
| Total Current Assets | 98,847,890 | 97,518,890 |
| Property, Plant & Equipment (net) | 199,844,381 | 201,230,666 |
| Other Noncurrent Assets | 1,352,475 | 1,541,844 |
| Total Assets | \$300,044,746 | \$300,291,400 |
| Liabilities and Net Assets | | |
| Liabilities | | |
| Current Maturities of Long-Term Debt | \$3,190,281 | \$3,100,281 |
| Other Current Liabilities | 6,683,981 | 9,184,116 |
| Total Current Liabilities | 9,874,262 | 12,284,397 |
| Long-Term Debt | 85,719,934 | 91,075,743 |
| Refundable Priority Obligations | 1,755,963 | 1,435,478 |
| Deferred Revenue From Advance Fees | 287,021,462 | 283,715,331 |
| Net Assets | | |
| Net Asset Deficiency without Donor Restrictions | (85,936,109) | (89,814,418) |
| Net Assets with Donor Restrictions | 1,609,234 | 1,594,869 |
| Total Net Asset Deficiency | (84,326,875) | (88,219,549) |
| Total Liabilities and Net Asset Deficiency | \$300,044,746 | \$300,291,400 |

Statement of Activities

Fiscal Year Ended June 30

| Net Assets Without Donor Restrictions | 2025 | 2024 |
|--|--------------------|--------------------|
| Revenues | \$54,446,651 | \$51,366,132 |
| Expenses (excluding depreciation & amortization) | 45,791,458 | 44,063,565 |
| Depreciation & Amortization | 10,196,441 | 9,448,558 |
| Total Expenses | 55,987,899 | 53,512,123 |
| Change in Net Assets Before Other Income (Expenses) | (1,541,248) | (2,145,991) |
| Other Income (Expenses) | | |
| Investment Income | 5,677,252 | 4,581,265 |
| Other Non-Operating Expenses | (257,695) | (105,092) |
| Change in Net Assets Without Donor Restrictions | \$3,878,309 | \$2,330,182 |
| Change in Net Assets With Donor Restrictions | \$14,365 | \$102,841 |

In December 2024, Fitch Ratings affirmed Lenbrook's investment grade rating of "BBB" and upgraded the Outlook to Positive. In issuing their rating, Fitch noted Lenbrook's successful stabilization of the Kingsboro expansion, strong operations, reduced debt burden, and growth in unrestricted cash and investments.

Condensed and consolidated financial statements of Lenbrook Square Foundation, Inc. and its wholly owned subsidiary, Menders by Lenbrook, LLC, are audited by independent certified public accountants. Additional information is available from the Chief Financial Officer, by request.

Letter from the Chairman of the Board of Directors



As we bring this year's annual report to a close, it is fitting to reflect on what makes Lenbrook such a truly special community. It begins with our residents, whose energy, presence, and vibrancy create a place where life is rich and thriving. It is championed by our associates, whose commitment and service embody a culture of hospitality and care. And it is guided by our management team, whose leadership and stewardship ensure both excellence today and vitality for tomorrow.

Together, these three elements form the heart of Lenbrook. Because of their unique connection, **"Here you can"** comes to life every day.

Here you can Connect, Live Well, and Be Fulfilled. These ideals, and our standard of excellence, define who we are today and shape the future we are building together.

The Board of Directors is proud to steward this remarkable community and all who are part of it. On behalf of the Board, I thank you for your engagement, your trust, and your support. With you, we will continue to ensure that Lenbrook thrives for generations to come.

A handwritten signature in black ink, reading "Shari Lotz".

Shari Lotz
Board of Directors Chairman

Board of Directors

Shari Lotz, Chairman

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Lenbrook

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Atlanta, GA 30319

Tel. 404-264-3386

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For further information about this policy, contact the Corporate Compliance Officer at 404-264-3355.