



## 2025 Committee Reports

## 2025 FINANCE COMMITTEE REPORT

**2024 Audit and 990 Tax Return** - The Foundation's first audit was conducted by the firm of Mauldin & Jenkins, requiring a significant amount of document production and evaluation by our staff and consultant. Results were reported in July and concluded that all financial matters were handled in accordance with appropriate standards. There were no corrections noted, and in fact, there were no suggestions for improvement. This is testimony to the hard work and careful administration by our leadership, former Treasurer Chuck Brooks, and by Sandy Lyons and our accounting consultant. Mauldin & Jenkins also prepared our 2024 tax return, and we have engaged them to provide both services again for the year-ended 2025.

**Simplification of Financial Reporting** - We rely on Gulf Coast Philanthropic Solutions's Steven Kissinger's accounting for monthly financial statements, bank statement reconciliations, cash flow projections and budget preparation. His management reports are heavily detailed in accordance with standard accounting practices. However, in order for our trustees, officers and committee members to obtain an easier understanding of the big picture, we have begun to provide summary reports, with instant answers to any questions, and full reports available.

**Finance Committee** - There's always been a Committee, but this year we added two CPAs. Resident Russ Peppet retired at the very highest level from a renowned international firm. David Ferguson, a former Bentley employee and Foundation scholarship recipient, now is a manager with a regional firm, and has offered to pay Bentley back by volunteering to help. They join residents Wayne Antworth, Art Horwitz, Lyman Phillips, and Bill Welbourn, and outside resources Steven Kissinger and Cory Shapira (VP at FineMark Bank).

**Investment Sub-Committee** - Our Investment Policy was amended in 2025 to include that the percentage ranges of our investment asset classes apply to both the Endowment Funds and the Operating Fund. Also, Collier Community Foundation introduced us to their new Investment Advisor (FEG), and its market analysis. They provided alternative suggestions for aligning our risk tolerance with investment options they offer.

**Transaction Growth Impact** - Because of the increase in the number of contributions, and the loss of volunteer leaders, the complexity of our organization has become more difficult. So, the Foundation has turned over additional tasks to our newly promoted Administrator (Sandy Lyons) and to Steven Kissinger. Plus, an Administrative Assistant (Sharyn McCoy) has been hired, and a resident (Sarah McKee) volunteered to supplement the scanning of checks. These changes have caused the need for new or upgraded equipment (phones, computers, check scanners, etc.) and supporting hardware and software. It's not a large cost, but it took a great deal of time, effort and coordination to become operational.

## 2025 DEVELOPMENT COMMITTEE REPORT

The Development Committee is responsible for coordinating the fundraising program of the Bentley Foundation. 2025 was the most successful fundraising year in our ten-year history. The Foundation in 2025 raised a total of \$798,310, achieving a 14.5% increase over 2024.

The Development Committee had three appeals throughout 2025. The **Annual Membership Appeal** in March raised \$318,541 with money designated for three areas. Scholarships received \$120,622 and Programs received \$64,020. Where Needed Most raised \$133,899. This giving choice provides flexibility to the Board of Trustees in funding and implementing new programs.

The **Dollars for Scholars Golf Tournament** chaired by Jim and Denise Greer raised in the fall \$264,220 for the Bentley Wings Scholarship Fund. This was a record raising nearly \$100,000 more than last year. We extend to the Greers our appreciation for chairing the DFS event for the past two years. We need volunteers to step up and join a dedicated committee as Chair/Chairs for 2026.

The **Year end Appeal** was established two years ago and was intended to give folks an opportunity to give charitable year-end gifts that include cash, securities, legacy gifts, and Qualified Charitable Distributions (QCD). In 2025 \$82,920 was contributed.

The Memorials and Tribute fund received \$25,838 to remember, honor, and show appreciation to residents, family members, friends and employees. The Foundation also received from Dr. Jiri Jonas \$80,000 to fund the Dr. Anna Jonas Scholarship Endowment.

The Board of Trustees, on behalf of the Bentley Foundation, is grateful to everyone who has supported the Foundation financially or as a volunteer. **During our 10-year history, our donors have contributed over \$5 million, allowing us to serve our Bentley community and neighbors in Southwest Florida.** We could not fulfill our mission without the hours of volunteer help and the contributions of our generous donors. Your time, talents and gifts do make a difference!

Wayne Antworth

February, 2026

## Communication Annual Meeting report

The Communication Committee has oversight responsibility for all of the communications that come from Bentley Foundation.

In 2025 the key communication components were the monthly newsletter, the Annual Report, support of the Scholarship Program, support of fundraising and management of our website.

2025 accomplishments include:

1. Major redesign of the website.
2. Production of videos to help recruit new scholar candidates.
3. Leadership of the new branding effort: Bentley Village Foundation is now simply Bentley Foundation. Our tagline which echoes our mission is “Enriching Lives”.
4. Renamed the newsletter from “Happenings” to “Community Matters” to better reflect our commitment to Bentley Village as well as our neighboring communities.

For the upcoming year one of our goals is to find ways to support our Outreach Programs such as the new EMT/Firefighters Grant Program.

Tom Weyl, Chair  
February 2026

## **BVF Scholarship Committee Annual Report 2025**

Membership: Joan Frey and Wendy Wiltse, Co-chairs; Ken LaMotte, Jeanne Berger, Cliff Anzilotti, Dawn Kerth, Patricia Dabbar, Linda Clemons, Anne Kaplan.

In the 10 yrs since the beginning of the scholarship program, we have awarded 99 scholarships for an obligation of over \$2.6 million. Since inception, at least 61 of our scholars have graduated from accredited technical schools and colleges.

In 2025 we received 14 new applications for scholarships. Five were from Bentley Village employees and nine from dependents of employees. We awarded 12 new scholarships to 3 employees and 9 dependents. The Bentley Wings scholarships are competitive and are awarded to 50% of employees who apply. These scholarships are for \$6000 per year and are renewable for up to 8 years of study.

Scholarship applications for 2026 opened in November 2025 and closed February 2, 2026. The new applications will be reviewed and rated by four members of the BVF Scholarship Committee and five reviewers from our partner, Collier Community Foundation (CCF). New scholarships will be announced in May 2026. One advantage of our partnership with CCF is that students who apply for the Bentley Wings Scholarship are also considered for 70+ other scholarship programs administered by CCF.

BVF restructured the scholarship awards that will begin in 2026. Those new scholarships will be for \$7000 per year, renewable for up to 4 years with two possible 2 yr extensions for advanced study.

The Scholarship Committee in 2025 considered options for expanding the scholarship program in future years. As a result, a grant will be made In 2026 to Florida SouthWestern State College to support training for EMTs and Paramedics in Southwest Florida.

Wendy Wiltse, Co-Chair  
February 2026

## **2025 ANNUAL REPORT**

### **BENTLEY FOUNDATION PROGRAM COMMITTEE**

Co-Chairs: Sharon Bailey, Diane Halas, Barbara Nielsen

Committee Members: Leilani Brenner, Jeannie Hutzler, Judy Jacobs, Marcia Norberg, Nancy Wallace, Lani Wheeler, Bill Welbourn (Vice Pres. representing Board), Sandy Lyons (Administrative Assistant).

Members who stepped down: Beth George, Sue Leonard, Diane Halas.

Our committee continued our objectives of providing opportunities to perform music and dance and to participate as listeners. All of our events contribute to cognitive stimulation for Bentley residents.

2025 was a year of transition. Our Music Therapy leaders left “The House of Music Therapy” and became independent clinicians forming their own companies.

Our committee has changed from being run totally by volunteers to having the Board’s Assistant, Sandy Lyons, take over some of the work. Barbara Nielsen stepped down from being committee co-chair to being the liaison for the Music Therapists only.

#### **Participatory Activities**

**Belles and Beaus:** Sharon Bailey, Director Jodie DeSalvo. 30 singers, weekly rehearsals, one concert in Spring and one in December.

**Ukulele Classes:** Sue Leonard. Instructor Roberta Schuster. 7 students with one weekly class.

**Music Therapy:** Barbara Nielsen, 3 Music Therapists conducting classes in Independent Living, Assisted Living and Care Center once a week each.

**Opera:** Leilani Brenner, Sue Leonard. 7 Metropolitan Opera screenings held in the Theater.

**Forum:** Jeannie Hutzler, Chair, Shirley Hagerson, Frank Halas, Sue Leonard, Marcia Norberg. 4 presentations of pertinent topics held in the Palmetto Room.

## **Schedule of Staged Performances**

Jan. 6 Whitney Grace, Soprano  
Feb. 6 Classic Trio, Jodie DeSalvo  
Mar. 4 Mardi Gras with Dixieland Jazz Band  
Mar. 24 Paradise Coastmen, Barbershop Singing  
April 10 Anne Tormela, Opera concert  
April 11 FGCU Piano Students  
April 17 Jodie DeSalvo, Chopin Piano Concert  
April 30 Belles and Beaus perform at ALR  
May 1 Belles and Beaus perform in Palmetto Room  
May 29 Konstantin, Grand Piano Concert  
June 26 Hwy. 41 South, Blue Grass  
Sept. 24 Doug Williams, Violin and Piano  
Oct. 23 Konstantin, Grand Piano Concert  
Nov. 13 Del Prados  
Dec. 5 Brass Elements  
Dec. 17 Belles and Beaus at ALR  
Dec. 18 Belles and Beaus in Palmetto Room  
Twice a week: Doug Williams Sing-a-Longs Seaside Lounge

Sherry Bailey, Co-Chair

February 2026

# Volunteer Committee Report

## 2025

The Volunteer Committee functions as a developer of plans to recruit volunteers needed to maintain a functioning Foundation. Its focus is to maintain adequate volunteer levels at the standing committees, with an emphasis on redundancy in the chair positions, tracking overlapping tenure in the volunteer positions, and maintaining proper skill sets for the committee functions.

The committee coordinates with Vi Lifestyle in introducing the Foundation to new residents at Vi's "**Getting to know Bentley Village**" presentations. Lifestyle also provides the committee with bios of new residents, in order for us to match their skill sets with the needs of the Foundation.

### The 2025 goals of the committee were as follows:

1. Prepare a Constant Contact solicitation for recruiting a person for the role of Communication's Committee Chair.
2. Work with the Communication's Committee to organize periodic meetings and recruit the personnel to assist with the editorial and proofreading tasks of the publications it produces.
3. Recruit and develop a person for the role of Development Committee Chair.
4. Work with the Program Committee to find individuals to oversee each of the various programs they administer, particularly the music-related offerings.
5. Recruit a person to assist with the scanning of donation checks when Art Horwitz is travelling.
6. Recruit volunteers to form a Nominating Committee for 2026 Foundation trustee and officer positions.
7. Recruit volunteers to staff the Volunteer Committee.

The committee reports that many of its goals were accomplished. We have a new recruit for Communication's Committee Chair, who has resumed regular organized meetings. We have a back-up person to scan donations. And we have recruits from the Program Committee to oversee music therapy, opera streaming, Forum presentations, dance events, and participatory music. We also formed a Nominating Committee for 2026 Foundation trustee and officer positions.

We did not, however, find a Development Committee Chair and we now also need a Program Committee Chair. In order to help address those needs and to shore up other volunteer needs, we hired a second employee (Sharyn McCoy) as an Administrative Assistant and promoted Sandy Lyons to Administrator for the Foundation.

Finally, in order to address the continuing need for volunteers, we initiated in 2025 an inaugural **New Resident Happy Hour**, where we described in detail the workings of the Foundation and invited these new residents to **make an impact** by joining the Foundation as volunteers.

Submitted by Bill Welbourn  
Chair—Volunteer Committee