

2025 ANNUAL REPORT

10
Years

2016 - 2026



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2025 BOARD OF TRUSTEES/STAFF

EXECUTIVE COMMITTEE



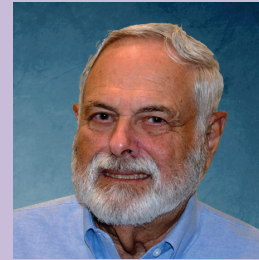
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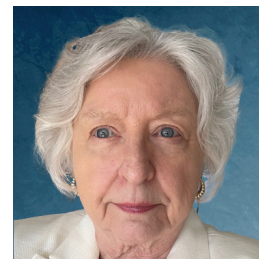
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Program Co-Chair



Wendy Wiltse
Scholarship Co-Chair



Sandra Lyons
Administrator



Sharyn McCoy
Administrative Assistant

PRESIDENT'S REFLECTIONS

CELEBRATING OUR 10-YEAR ANNIVERSARY!

10
Years

A decade ago, the Bentley Village Foundation began with a simple but powerful idea: to enrich the lives of the residents who call Bentley Village home. This year's Annual Report celebrates our 10-Year Anniversary and highlights the impact of ten years of generosity, volunteerism, and community support. As we reflect on all that has been accomplished, we also look ahead with renewed energy and enthusiasm for the decade to come.

Each section of this report shares stories from a very successful decade and an outstanding year in 2025. The Scholarship Committee awarded 13 scholarships in 2025 to 10 new scholars, bringing the total to 99 scholars awarded since our founding. The Program Committee continued to enhance community life through concerts, FGCU Academy classes, forums, opera streaming, Belles and Beaus, English as a Second Language (ESL), and music therapy programs in Assisted Living and the Care Center. Our Community Outreach initiatives awarded \$38,750 to organizations and programs including FGCU Academy, Avow, the Baker Center, the Literacy Council, Citizenship Awards, and the Bonita Senior Center.

The financial pages of this report tell an especially exciting story—2025 was the best financial year in our history. The Bentley Foundation raised \$798,310, including an \$80,000 gift to establish the Dr. Ana M. Jonas Scholarship Endowment Fund. None of this would be possible without the extraordinary generosity of our donors. Every gift truly makes a difference.

WHAT'S NEW?

- New name: Bentley Village Foundation, Inc. is now **Bentley Foundation, Inc.**
- New website: www.bentley-foundation.org
- New newsletter name: **Community Matters**
- New grants: Approved funding the training of firefighters and EMTs

I have had the privilege of serving on the Foundation's Board of Trustees and as President for the past two years, following Tom Lynch, Brian Hitch, and Diane Halas. Bentley Foundation has been built on the dedication of committed volunteers who have devoted thousands of hours of service, and on the generosity of donors who have contributed just over \$5 million to support our programs.

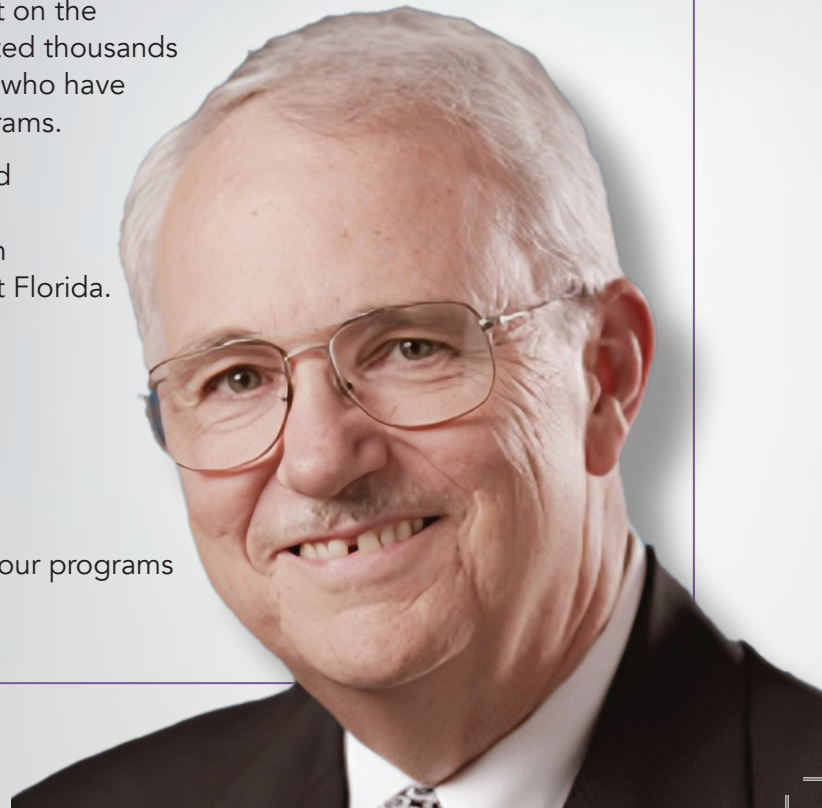
I encourage all Bentley residents to become involved with the Foundation as, together, we continue to evaluate and enhance our programs to further enrich community life at Bentley and throughout Southwest Florida.

Sincerely,



Wayne Antworth President
Bentley Foundation, Inc.

The Foundation continues to evaluate and enhance our programs to further enrich community life at Bentley.



ENRICHING LIVES THROUGH **SCHOLARSHIPS**



In the past 10 years, the Foundation has awarded scholarships valued at over \$2.6 million to 99 Bentley Village employees and their dependents. Over \$1 million has already been paid out. During this time 61 of our scholars have graduated from accredited schools and 27 remain active. The amount of the scholarship awards have increased over time, and in 2026 the new scholarship awards will be \$7000 per year. The scholarships are now renewable for 4 years, with two possible 2-year extensions for advanced study. Our scholarships have supported young people born in Haiti, Ukraine, South and Central America, often the first in their families to attend technical school or college.

Scholarships have led to:

- **Nursing and healthcare degrees**
- **Hospitality and culinary training**
- **Business and Technical degrees**
- **Advanced degrees and more**



David Ferguson, now a CPA working in Bonita Springs, received a Bentley Wings Scholarship in 2017, one of our first scholars. An ambitious student, David graduated with a Masters Degree and earned his CPA license. He says "The scholarship was not just financial assistance, it was also a vote of confidence." David feels a strong responsibility to give back, and now volunteers on the Bentley Foundation's Finance Committee, lending his professional experience to advance the Foundation's mission.



ENRICHING LIVES THROUGH SCHOLARSHIPS

JENNY DOR

Jenny is the daughter of Marie Basile, CNA, and is attending Florida International University. She is majoring in Psychology while completing classes for the pre-med route, with the goal of becoming a doctor. She explains, "Ever since I was a child, I wanted to be a doctor. I knew it would be a long, challenging process, but I am committed."

It's no surprise that Jenny's plans for the upcoming year are ambitious. She notes, "I want to maintain straight A's and create close bonds with teachers, as they will be helping me with my entrance to Med school." In addition to her studies, she expects to work as an LPN, shadow a doctor, and volunteer at a clinic. She says, "These activities will help me on my route to becoming a doctor."

"This support not only empowers me to pursue my dream, but helps me become a role model for my siblings and shows my parents that anything is possible."

For Jenny and many of our scholars, the Bentley Wings Competitive Scholarship is more than just financial assistance. She notes, "While your support has lifted a tremendous burden, allowing me to focus on my studies without the constant worry of how I will afford tuition, textbooks, or basic living expenses, this scholarship is a vote of confidence in my potential future. It reminds me that there are people who believe in the power of education and are willing to invest in students like me. Thank you for making a real and lasting impact in my life."

"Your kindness and generosity have opened doors that once felt out of reach, and I carry that with me every single day," Jenny says. She adds, "This support not only empowers me to pursue my dream, but helps me become a role model for my siblings and shows my parents that anything is possible. I want to make my whole family proud."



ENRICHING LIVES THROUGH PROGRAMS

Music, Cultural and Intellectual Stimulation

The Foundation's approach to enriching the lives of our residents is intentionally multi-layered, **offering a rich blend of musical engagement, therapeutic support, and intellectual stimulation.** Our music programs invite residents to participate actively in singing, rhythmic activities, and collaborative performances that foster joy, connection, and creative expression. In addition, our concert series brings exceptional musicians to campus, providing entertainment while deepening residents' appreciation for a wide range of musical styles.

For those facing memory challenges, our **certified music therapists deliver personalized sessions designed to strengthen cognitive function, reduce anxiety, and support emotional well being.** These evidence-based interventions create meaningful moments of comfort and recognition.

Beyond music, we offer robust opportunities for lifelong learning. **Our Forum series features thought-provoking discussions on aging, culture, science, government, and local issues, encouraging curiosity and conversation.** Residents also enjoy access to world class artistry through **Met Opera Streaming,** which brings acclaimed opera productions directly to our campus, enriching cultural life in an accessible and inspiring way.



Belles & Beaus – 2025 Holiday Concert

ENRICHING LIVES THROUGH PROGRAMS



Brass Elements Holiday Cheers

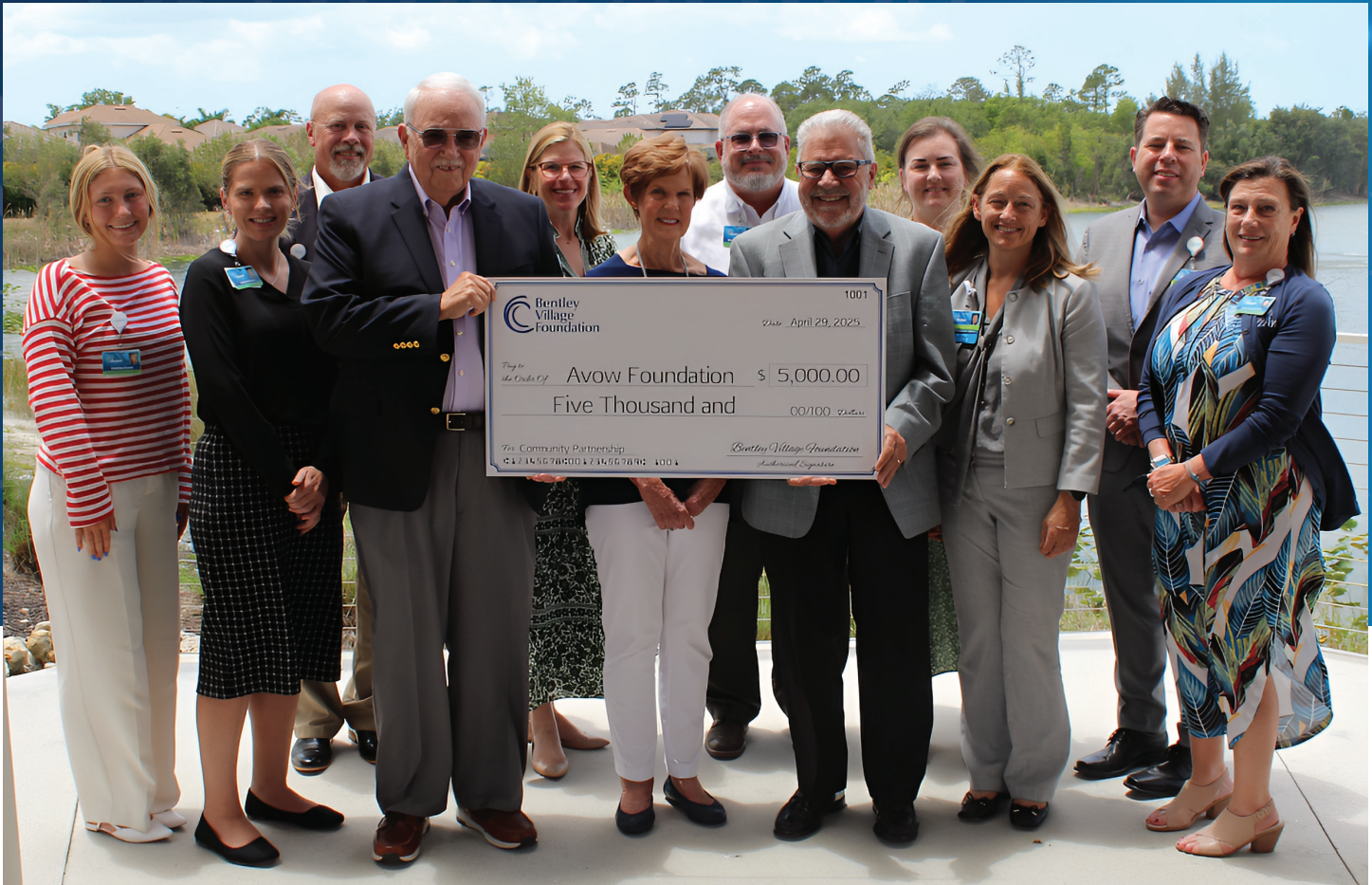


The Forum Series included a presentation on Water Quality featuring Collier County Water Management representatives



Le Phuong Pham. FGCU Bower School of Music

COMMUNITY OUTREACH



The Bentley Foundation's Outreach Program awarded a \$5,000 grant to Avow Hospice, strengthening their commitment to compassionate end-of-life care. Many Bentley residents have benefitted from Avow's support, and this partnership underscores the Foundation's dedication to fostering comfort, dignity, and connection within our community.

Through your generosity, our Foundation extends its impact far beyond Bentley Village, strengthening the fabric of our wider Southwest Florida community. Your support enriches the lives of our senior residents through meaningful programs that inspire connection, learning, and joy. Beyond our



campus, your gifts empower vital partners, including Avow, the Baker Senior Center, the Bonita Senior Center, FGCU's lecture series, and the Literacy Council's English as a Second Language programs—ensuring that compassion, learning, and support reach those who need it most.

Bentley Village Foundation awards Annual Grant of \$3000 to the Literacy Council of SW Florida. Through the Council's network of tutors, many Bentley employees benefit from its English as Second Language Program. Several BV residents participate as tutors.

LEGACY GIVING

Legacy giving—also called planned giving—offers a powerful way to support the Bentley Foundation while meeting personal financial and philanthropic goals. By including a 501(c)(3) nonprofit charitable organization in your will, trust, or beneficiary designations, you can make a lasting impact without affecting your current lifestyle. Because many planned gifts are made from assets rather than income, they may also offer tax advantages and estate-planning flexibility.

Planned gifts can also establish Bentley Foundation endowments that provide reliable, long-term funding for programs you care about funding whether for scholarships, educational initiatives, outreach efforts, or other vital programs while preserving the principal to benefit future generations. Endowment funds are invested, and annual earnings support a designated purpose while preserving the principal for future generations.

For donors, legacy giving brings peace of mind and the satisfaction of creating an enduring impact. For charities, it provides stability and sustainability—ensuring important work continues well into the future.

Bentley Village Foundation Receives \$80,000 Scholarship Endowment Honoring Dr. Ana M. Jonas

The Bentley Village Foundation is deeply honored to announce a generous \$80,000 scholarship endowment from Dr. Jiri Jonas, given in loving memory of his late wife, Dr. Ana M. Jonas. This meaningful gift will support educational opportunities for Bentley Village employees and their dependents, reflecting Ana's lifelong dedication to science and learning.

Ana Masiulis Jonas (1943–2024) was a pioneering biochemist whose groundbreaking research at the University of Illinois Urbana-Champaign (UIUC) advanced our understanding of lipoproteins and cardiovascular health. Her distinguished career included developing reconstituted HDL techniques and receiving the Jack Oram Lifetime Achievement Award for HDL Research.

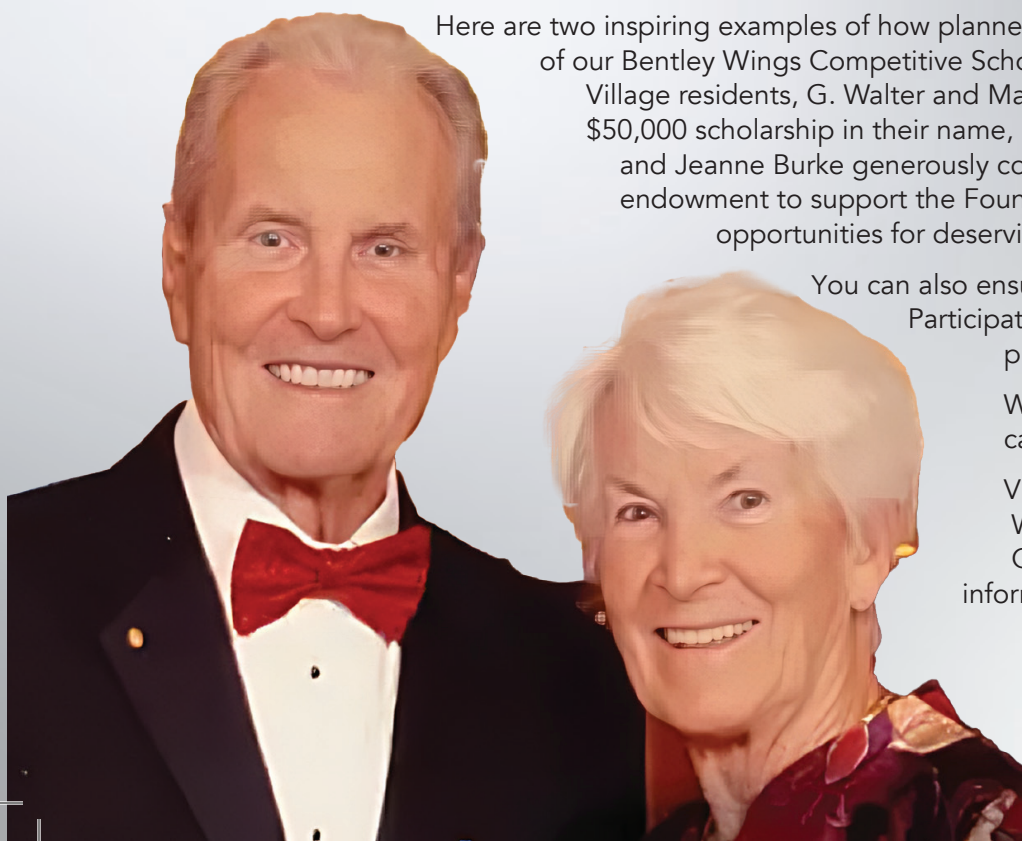
Jiri Jonas, a renowned physical chemist and professor emeritus at UIUC, is celebrated for his innovations in high-pressure spectroscopy and his leadership at the Beckman Institute. His gift to Bentley Village Foundation not only honors Ana's legacy but also embodies the couple's shared commitment to education and scientific advancement. We extend our heartfelt gratitude to Dr. Jonas for this extraordinary act of generosity, which will inspire future scholars and preserve Ana's legacy of brilliance, resilience, and compassion.

Here are two inspiring examples of how planned giving has helped secure the future of our Bentley Wings Competitive Scholarship program. Long-time VI at Bentley Village residents, G. Walter and Martha Adams Erickson, established a special \$50,000 scholarship in their name, benefiting three scholars to date. James and Jeanne Burke generously contributed a \$100,000 scholarship endowment to support the Foundation Scholarships, ensuring continued opportunities for deserving students.

You can also ensure the continuation of Music Therapy, Participatory Music and other valuable programs with planned giving to the Program Fund.

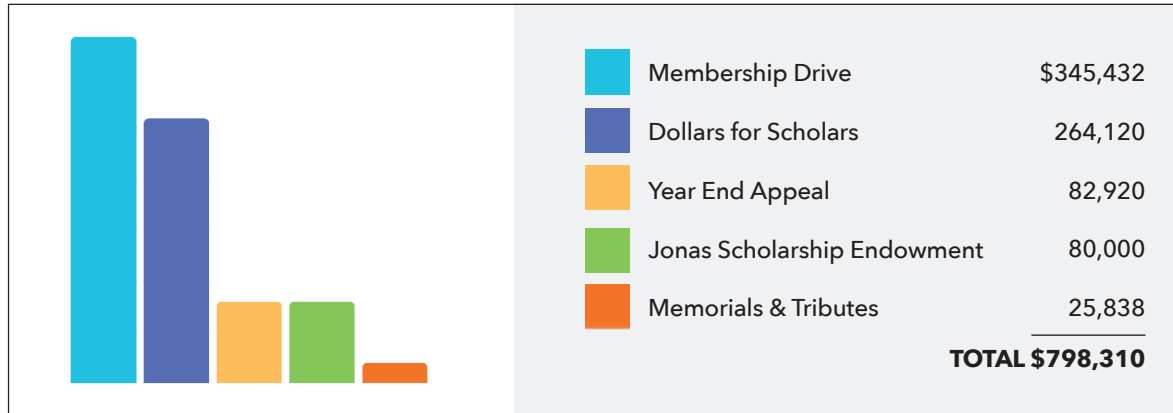
We invite you to explore how planned giving can fit into your legacy.

Visit Bentley-Foundation.org or contact Wayne Antworth (845-518-4135) or Paul Ciccarelli (239-262-6577) for more information on how you can make an impact.



SUPPORTING OUR MISSION

2025 was the most successful fundraising year in the Foundation’s history, achieving a 14.5% increase over 2024.



We are very appreciative to all our donors, who provide the basis for supporting scholarships and programs that enrich the lives of our residents, and of others in SW Florida.

Three items of note contributed to new opportunities this fundraising year:

- We added a new giving choice, “Where Needed Most”, providing flexibility to the Board of Trustees.
- The Dollars for Scholars Golf Tournament, chaired by Jim and Denise Greer, raised almost \$100,000 more than in 2024.
- Jiri Jonas contributed \$80,000 to establish the Dr. Ana M. Jonas Scholarship Endowment Fund.

YOUR SUPPORT AT WORK

Scholarships

Your generosity has supported 99 scholars over 10 years, including 10 first time scholars this past year. Some have been awarded multiple scholarships. More than \$2.6 million has been awarded, with \$1,005,612 paid to date. 27 scholars are currently pursuing their goals. Long-term investments estimated at \$1,006,000 ensure future scholarship commitments.

Programs

Your gifts enrich life across Independent Living, Assisted Living, and the Care Center through concerts, participatory music, music therapy, and cultural and intellectual programs.

Community Outreach

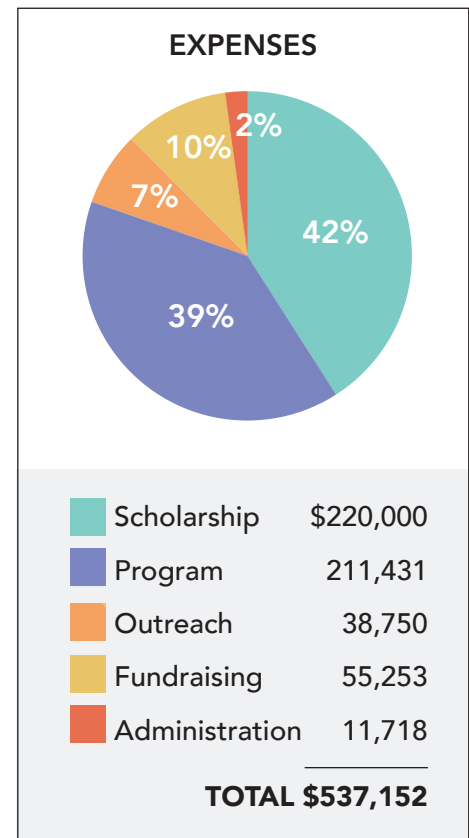
Your support extends beyond our campus through partnerships with FGCU Academy, Avow, the Baker Center, the Literacy Council Citizenship Awards, and the Bonita Senior Center.

Fundraising

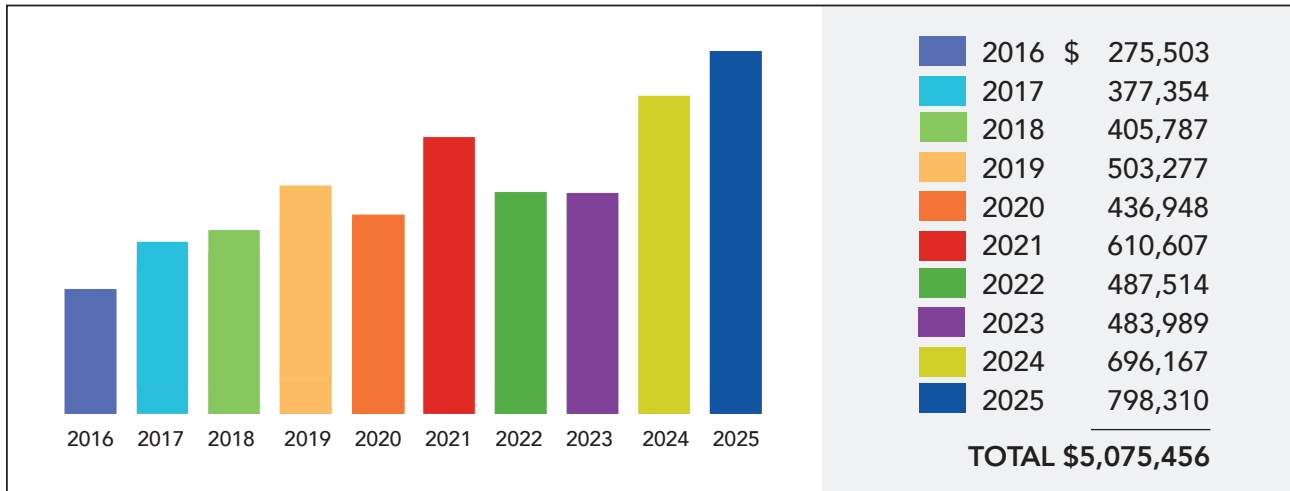
Fundraising expenses cover appeals, communications, publications, printing, and event food and beverage.

Administration

Essential administrative costs include accounting, staff support, database management, printing, legal services, and insurance.



BENTLEY FOUNDATION GROWTH THROUGH THE YEARS



The Board of Trustees, on behalf of Bentley Foundation, is grateful to everyone who has supported the Foundation with both large and small gifts for 10 years. During this first decade, our donors have contributed over \$5 million, allowing us to serve our Bentley community and neighbors in SW Florida.

The chart above highlights the annual contributions of Bentley residents. We could not fulfill our mission without your generosity. Your gifts do make a difference!

You may donate by check, credit card, the Foundation icon on Uniguest, or at www.bentley-foundation.org. When you donate, you may designate your contribution to the Scholarship Fund, the Program Fund, or to Where Needed Most.

FINANCIAL SUMMARY - ANNUAL REPORT 2025

(unaudited)

BALANCE SHEET	
ASSETS	
Cash	\$ 139,443
Short-Term Investments	711,889
Long-Term Investments	2,245,731 *
Net Fixed Assets	13,175
Total	\$3,110,238
LIABILITIES	
Current Liabilities	\$ 9,787
Equity	3,100,451
Total Liabilities & Fund Balance	\$3,110,238

PROFIT & LOSS	
REVENUE	
Contributions	\$ 798,310
Investment Revenue	461,284
Unrealized Loss	(194,542) **
Total	\$1,065,052
EXPENSES	
Scholarship	\$220,000
Program	211,431
Outreach	38,750
Fundraising	55,253
Administration	11,718
Total	\$537,152
Net	\$527,900

* \$1,656,450 is designated for scholarships, with future scholarship obligations estimated at \$1,006,000

** Losses result from Collier Community Foundation's transfer to a new financial advisor firm



Bentley Village Foundation is rated Four Star, the highest rating available by Charity Navigator and Candid (formerly GuideStar). These organizations assist millions of donors in their charitable decision-making. These ratings reflect a charity's programs, stability, efficiency, and sustainability.

BE A VOLUNTEER MEMBER



The Heart of Bentley Foundation

Our volunteer members are the heart of Bentley Foundation (BF), dedicating their time, talents, and energy to help drive the Foundation's initiatives. Their support embodies the true spirit of service and generosity. We could not make the impact we do without our volunteers. In 2025 alone, they committed 6,319 hours in service to the Foundation. Without that commitment, we couldn't fulfill our mission of incorporating your generosity into the impactful programs and scholarships that support our community.

Join BF and make a meaningful impact! As a volunteer you'll find purpose, support causes you believe in, and enhance the lives of the Vi at Bentley Village Community and others in Southwest Florida. Discover the rewards of volunteering – a chance to meet new people, to engage more deeply with the community, and to use your skills to touch lives.

Contribute as much or as little time as you prefer. Explore diverse volunteer roles:

Leadership Roles:

- Program Chair Position open
- Development Chair Position open
- Board of Trustees
- Committee member for Scholarships, Programs, Communications, Finance or Volunteer

Occasional Jobs:

- Event Greeter
- Event Planner
- ESL Tutor
- Article Writer or Proofreader
- Photographer
- Sign/Poster Manager

On the next page you'll find the names of the dedicated volunteers who helped make a difference in 2025.

Contact Bill Welbourn 732-615-8697, bmw4748@gmail.com, if you are interested in volunteering or have any questions.

VOLUNTEERS

Trustees

Wayne Antworth
Steve Aronson
Sherry Bailey
Cyndy Carlson
Paul Ciccarella
Art Horwitz
Joan Frey
Jim Greer
Ken LaMotte
Barbara Nielsen
Bill Welbourn

IT Consulting

Terry Lake

Donor Perfect Assistance

Karen Rosenstein

Finance Committee

Steve Aronson, Chair
Wayne Antworth
Art Horwitz
David Ferguson
Russ Peppet
Lyman Phillips
Cory Shapiro
Bill Welbourn

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Sherry Bailey, Co-Chair
Leilani Brenner
Jeannie Hutzler
Judy Jacobs
Sue Leonard
Marcia Norberg
Susan Sterner
Nancy Wallace
Lani Wheeler

Scholarship Committee

Wendy Wiltse, Co-Chair
Joan Frey, Co-Chair
Cliff Anzilotti
Jeanne Berger
Linda Clemons

Patricia Dabbar
Dawn Kerth
Anne Kaplan
Ken La Motte

Communications

Tom Weyl, Chair
Joan Frey
Sue Leonard
Bill Welbourn

FORUM

Jeannie Hutzler, Chair
Frank Halas
Sue Leonard

Dollars for Scholars

Jim Greer, Co-Chair
Denise Greer, Co-Chair
Stan Geer
Dolly Howard
Bob Iorizzo

Barbara Herstig
Sue Leonard
Judy Lynch
Helen Roth
Sharon Vic

Putting Contest

Nataliel Knecht, Chair
Mary Beth Huttenlocher

Registration

Judy Lynch, Chair
MJ Knipschild

Photography

Michael Johnson
Rick Boe
Sue Leonard



Development Committee

Wayne Antworth, Chair
Jim Greer

Volunteer Committee

William Welbourn, Chair

ESL tutors

Tripta Sarin, Chair
Linda Clemons
Wanda Goodman
Peter Leigh
Sally Melvin
Joyce Shields
Kathy Smith
Barbara Streicher
Alice Thorpe
Jon D. Wright
Sally Wright

Natalie Knecht
Judy Lynch
Bill Welbourn

DFS Sub Committees:

Hole Sponsor

Dolly Howard, Chair
Diane Holdeman

Hole Sponsor signs

Don Clemons

Online Auction Sub Committee

Bob Iorizzo, Chair
Leilani Brenner
Linda Gadkowski
Bev Gromek



DONOR LIST



Individual Donors

Up to \$2,499

Nancy Abramson
Bill & Sue Adams
Karen Aeschlimann
Jeffrey & Ellie Albertson
Allen & Delida Alexander
Aubin Ames
Sue Armstrong
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John & Sharon W Bailey
Ashok & Fay Bakhru
Brent & Kathleen Barents
Delores Barnett
Ramona Barrett
Elaine Bartlett
Jean Beaver
Owen & Patricia Berg
Myron & Jeanne Berger
George & Lorraine Bergeron
Frederic & Elinor Bertrand
Marion Besuden
Bob & Katie Biggs
Robert & Elaine Birrell
Ronald & Mary Bluestein
Joan Boardman
Daryl & Mary Ann Boddicker
Richard & Maridee Boe
Jerry & Linda Boisseau
Botanicals on the Gulf Kevin Morris
Michael & Ruth Boyd
Mary Helen Braeunig
Bertha Brando
Leilani Brenner
Chase & Susan Brooke
Michael and Lesley Brookman
Mari Broyles
Nancy V Bruce
Orville & Mary Bryant
Frank & Ann Burgeson
David & Camilla Burgess
Sandra Burroughs
Jane Burton
Linda & Douglas Burton
Richard & RoseMarie Butz
Helen Buzasi
Raymond Cairns
Hope Calabrese

Evelyn Caldrone
Charles & Dorothy Campbell
John & Margaret Campbell
Samuel Cannell
James Carpenter
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Frank & Barbara Cella
Page Chapman
Drake Chisholm
Theodore & Barbara Christiansen
Robert & Linda Clemons
Marcia Coble
John & Stephanie Coburn
Patricia Cohen
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Robert & Janice Conrad
Dave & Marcia Courtney
Richard & Virginia Craven
Audrey W. Craver
Cherrill Cregar
Jane Cullen
Chris Curle
Ralph & Jan Cutter
Patricia Dabbar
DAF giving 360 for Calvin &
Kathy Smith
DAF giving 360 for Russ &
Sandy Peppet
Robert and Gail Dale
Ron & Jessie Dalman
Martha Davis
Jo Ann Deery
Stephen Demidovich
Frances Diaz
Susan M. Dietrich
Paul Donald
Anne Marie Eastman
Alan Einhorn & Vicki Cooper
Jay Elliott
Atkinson/Ells Charitable Foundation
for Ralph & Madeline Ells
Genevieve (Genny) Esayian
ESTATE OF Marilyn Lightner
John & Sandra Estridge
Elisabeth Ann Evans
William Fankhauser
Fidelity Charitable for Kenneth Cyrus
Fidelity Charitable for Fred and
Sara Ewald
Fidelity Charitable for Oliver &
Kirsten Gildersleeve

Fidelity Charitable for Mark &
Cathy Walchak
Fidelity Charitablefor Bill and
Marilyn Welbourn
Fidelity Charitable for Barbara Steil
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Maggie Fowler
John & Nancy Fox
Caroline M Fraser
Joan Frey
Carolyn Fulton
Walter & Linda Gadkowski
Lois R. Gallea
Arthur & Catherine Galya
Judy Gantley
Miriam Geist
Maureen Genel
Nick & Carol Gentile
Lela M. Gershon
Blanche Gerstenhaber
Oliver & Kirsten Gildersleeve
Brian & Janet Gilmer
Goldman Sachs Philanthropy Fund
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Sue Greene
James & Denise Greer
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Jim Grimstad
Beverly Gromek
Marianna Gundolf
Jitendra & Santosh Gupta
Frank & Diane Halas
Tony & Janet Hall
Larry & Judith Halpin
Gail Hansen
Marilyn Hanson
Jeffrey & Laraine Hardy
George Harrick
Jacquita Hauserman & Bob Wydock
Paul & Margarita Henneberry
Donald & Ann Herring
Alven & Barbara Herstig
Jane Hetrick
Chester & Nancy Hobert
Helen Hofmann & Bob Piasecki
Brent Holleran
William & Mary Pat Hooper
Patricia Hoover
Charles & Mary Anne Hopkins
Daniel & Sharon Hopkins

Iris Horey
Donna Hornbuckle
Sydney & Hazel Horsfield
Dorothy Howard
Judith Howe
Ric & Mary Beth Huttenlocher
Jeffery & Jeannie Hutzler
John & Eileen Iaizzo
Allan & Mary Ivascu
Judith Jacobs
Eugene James
Eleanor Jaschen
Bob & Nancy Jaycox
Rita M. Jerger
Hilton & Georgia Jervey
Randal & Karen Jones
Romi Jordan
Paul & Rochelle Joseph
Robert & Bobbie Juster
Dolores Justus
Barbara Kalmes
Bruce & Anne Kaplan
Carole Kaplan
Ute Kaucnik
Nancy Kay
Michael Kell
Ken Kemper
Anthony Kennedy
Susan Kerr
Barbara Kerth
Joseph & Elin Kiernan
Margaret Kilhenny
Raymond & Frances King
Stanley Kisiel
Howard & Marjorie Klein
Natalie Knecht
Ken & Mary Jane Knipschild
Herbert & Carroll Koelling
Dave Koval Judy Rushmore
Iris Krempasky
Richard & Sara Krieger
Ove Kristensen
Cynthia Kruesi
Michael & Barbara Kurko
Terry & Susan Lake
Barbara Lapham
P. Robert Larson
Casey & Connie Lee
Frank & Jean Lee
Robert (Dale) & Phyd Lentz
Dave & Sue Leonard
John Lesure

DONOR LIST



Individual Donors cont.

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Larry & Phyllis J. Liebman
Jim Loffree
Marlene & Frank Long
John & Priscilla Lorusso
JoAnn Luster
Jane Lyles
Thomas & Judy Lynch
Sandra Lyons
Sharon Mazziotta Madison
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Ronald & Barbara Repice
Helga Richards
Terry & Arlene Riegel
Lilianne & Paul Rivera
Don Rizzo
Richard & Linda Robertson
Rockwell Foundation in memory of
Judith Aiken
Stanley & Emily Rose
Harold Rosenfelder
Karen Rosenstein
Lyle & Gloria Rosenzweig
Margaret Ross
Helen Roth
Nancy A. Rowe
Joseph Rumiesz
Patti Runkel
Tom & Donna Ryan
Amy Samoylenko-Russian
Lee & Polly Sample
Georgina Sands
Tripta Sarin
Daniel & Marilyn Scanlon
Brenda N Schlegel

Donna Schrock
Walter Seidel
Dave Shellenbarger
Mike & Bonnie Sherman
Judy Showers
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Roger & Ellen Sirlin
David Slocum
William & Patricia Smart
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Calvin & Kathy Smith
Jean Smith
Kathy Smith
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Vito Suziedelis
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Graycia Thompson
Alice Thorpe
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Pamela Trentadue
John & Linda Trimble
Kate Turbyfill
Charles Tuttle
Barbara Tyne
Rosemary Ufheil
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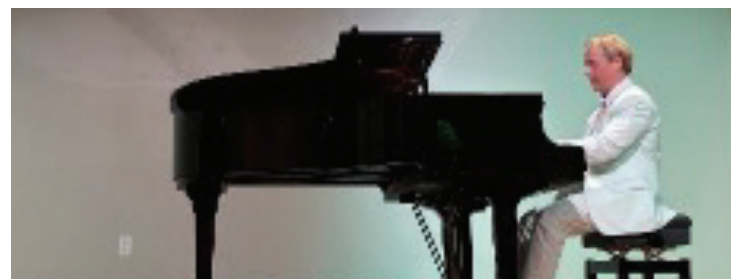
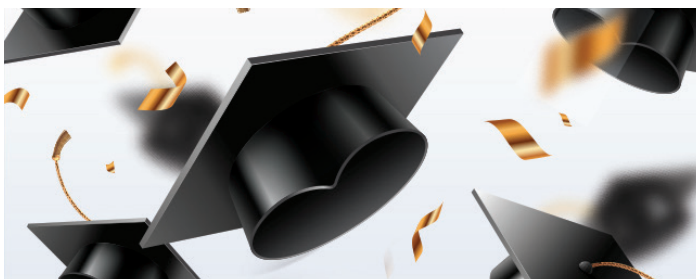
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