

AMAC FOUNDATION

2022 Annual Report



Supporting + Educating America's Seniors

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MISSION & BACKGROUND

our MISSION

“To help protect and ensure the financial security, health, safety, and social lives of current and future mature Americans, and to help Americans navigate the bewildering array of decisions they need to make.”



The AMAC Foundation

is dedicated to supporting and educating American seniors and plays a vital role in helping build the services that enrich their lives. Our goal is to help protect mature Americans and strengthen their financial security, health, safety, and social interactions.

The cornerstone of the AMAC Foundation is the Social Security Advisory Service. Staffed by dedicated individuals who have earned the accreditation and designation of National Social Security Advisors, our Advisors counsel retirees and pre-retirees on questions and issues pertaining to Social Security and provide guidance to Americans on the many Social Security options available. We are proud to offer this trusted, gold standard service to the public.

ON MISSION IN 2022

In 2022, AMAC Foundation took on a big change, transferring the Executive Director role from Mr. Gerry Hafer to Mrs. Joleen Teninty. Mr. Hafer remains onboard for mentorship, grant writing, Social Security Guarantee advisement, FVOP launch and growth, and other guidance.

Mrs. Teninty aims to maintain the mission and goals of the Foundation, while building relationships that enhance and increase community presence, online, and other capacities. The bottom line is to reach as many Seniors and Veterans as possible, ensuring they have resources that educate in the areas that impact them the most.

Ms. Paulette McBride is the newly onboarded Executive Assistant, working closely with Foundation staff and assists with day-to-day coordination, operations, and administration of activities.



LEADERSHIP MESSAGE

“As I reflect on my retirement from the Foundation Executive Director position, and as I think back on my role in the formative years of the organization, I share a sense of pride at having had the opportunity to work with a team of colleagues so dedicated to a mission. This shared sense of commitment is the ingredient that causes us to eagerly anticipate continued evolution under the direction of Joleen Teninty and the exploration of new avenues for service to the public.”

- GERRY HAFER, EXECUTIVE DIRECTOR, EMERITUS

“It is exciting to be a part of an organization that has a passion for helping America’s Seniors and Veterans. Also, to be part of a team that is enthusiastic about delivering accurate, current, and topnotch Social Security responses as well as other resources and information that cater to the needs of seniors in the community. I look forward to taking the team through 2023!”

- JOLEEN TENINTY, EXECUTIVE DIRECTOR

“Philosophically, the Foundation embraces the principles of the American free enterprise system and its role in achieving prosperity for this country. The Foundation is based in no small part on the principle that education is the key to Americans making informed choices for self-sustainability.

In response to interest expressed by Association of Mature Americans (AMAC) members for a nonprofit organization focused solely on the needs of America’s older citizenry, the Foundation’s Social Security Advisory Service (SSAS) was formed in 2016. These interests coincide with the stated mission of the AMAC organization: to serve as the voice of Americans 50 years of age and older, and to sponsor initiatives that keep America strong.

The AMAC Foundation’s mission encompasses the understanding that Social Security was established in 1935 as a safety net in retirement. Through extensive time and effort, AMAC Foundation’s team maintains current knowledge of Social Security, working alongside others to research and identify ways to ensure Social Security solvency.

The Foundation team understands the requirements and individualized needs for eligibility, choosing the right retirement age, and maintaining a steady income stream. Their continued efforts are passed on through the SSAS, resources, events, and other educational materials. We are grateful that the AMAC Foundation’s team cares about America’s Seniors and they know that for many elder Americans, Social Security is what puts food on the table and is a principal source of income.

AMAC and AMAC Foundation combined efforts are to ensure the promise to guarantee Social Security for all Americans – now and for future generations – is kept. While AMAC remains committed to promoting this important piece of legislation, the AMAC Foundation resolves to share knowledge in a consulting capacity of Social Security’s operational aspects, and to help assess how specific Social Security Guarantee components would impact Social Security benefits.”

- REBECCA WEBER, BOARD OF DIRECTORS, PRESIDENT

SERVICES & MAJOR PROGRAMS

OUR SERVICE TO AMERICA'S CURRENT AND FUTURE SENIORS

includes up-to-date information on several websites – AMAC Foundation, Social Security Report, and Medicare Report – which provide a steady stream of timely and critical information. The AMAC Foundation website houses thousands of resources, event promotion, and other organizational information for seniors to access. The reach extends through social media, newsletters, infographics, and other avenues. The Veteran support continues to grow, and in 2022, was enhanced through strong, like-minded collaborations.



“A new study shows that Americans nearing retirement age are ill-informed about their Social Security options,” according to Dan Weber, Founder, AMAC Foundation

SOCIAL SECURITY ADVISORY SERVICE (SSAS)

The AMAC Foundation officially opened its doors to the community in mid-2014. The mission embodied the vision of our Founder and first President, Dan Weber—a vision that drove the AMAC Foundation forward

The certification of our staff members is critical to our mission of supporting and educating America's seniors, and we believe that providing credible, unbiased information to people in, or aging into, Social Security is an important part of what the Foundation does. And, since the Foundation is a tax-exempt organization relying solely on contributions from the public to operate, there is no charge for this valuable service.

MEET THE 2022 SSAS TEAM WHO ADDRESSED THIS CRITICAL NEED



RESEARCH | TRAIN | SCRUTINIZE | COLLABORATE

Focused on **timeliness** and **quality**, the SSAS team stay up to date on information, engage in training and continuing credits, and research Social Security matters to deliver the best individualized responses to inquiries. We prioritize the need to provide clear, concise responses to ensure constituents clearly understand the information.

INFORMATION ON SERVICES:

<https://amacfoundation.org/services/>

YOUR SOCIAL SECURITY ADVISOR

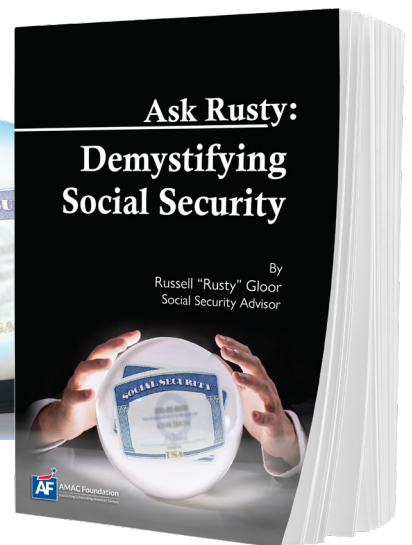
Ask
Rusty

...publishes in written and audio formats, with articles appearing on the AMAC App, AMAC's main website, AMAC Daily and Weekly News, on YouTube, and, of course, our Foundation website, Social Security Report, and podcasts.

The distribution extends beyond the AMAC Foundation and sister organization platforms – we now appear regularly in hundreds of national media publications, online news sites, and other outlets, with circulation in the millions.

A new **“Ask Rusty”** publication was released mid-year, available in print and on Kindle.

The prior “Ask Rusty” release was featured as a free option on Kindle Unlimited, increasing exposure.



eBook available on
amazon

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We utilize several avenues to promote SSAS and interact with the public. In addition to communicating via phone and email on direct inquiries, the team answers questions on the website and social media platforms. Several advisors engage in scripting and recording podcasts, posting on the various websites, and hold presentations.



I can't tell you how helpful Russell and Kenneth have been (and currently are) to me in answering my questions. Plus, they've provided additional information that was extremely helpful. I will definitely recommend AMAC to any and all of my friends!!! Plus, it's free! Thank you so much!

- B. Johnson

I want to thank you for all your help in successfully navigating my way to my Survivors benefits. I retired at the end of August and am happily collecting the benefit

- K. Henning

2022 (SSAS) STATS

7 NSSA-Accredited Advisors

~542 inquiries per month

Over 27K inquiries handled by EOY
(cumulative since 2016)

6571 Inquiries

- 58% Phone
- 42% Email

Top 5 Question Categories

- Medicare (15%)
- When to Claim Benefits (14%)
- Survivor Benefits (11%)
- Spousal Benefits (11%)
- Working & SSBs (6%)

Top 5 Inquiry Origin / Sources

- Previous Contact
- AMAC Website
- Magazine or Newsletter
- AMAC Foundation Website
- AMAC Member Services

Top 5 States Inquiries Originate In:

- FL (10.2%) ▪ TX (10%) ▪ CA (9.2%)
- PA (5.2%) ▪ NY (3.7%)

QA: Response Rate 49%

- Answered satisfactorily?
96% Completely
- Timely Response?
99% Completely
- Knowledgeable SSAS Advisor?
97% Completely
- Recommend SSAS to others?
98% Yes

Committed to Providing Resources for America's Seniors



AMAC Foundation routinely informs and educates America's Seniors through articles posted on their News & Info website page, as well as facilitating or promoting helpful events and resources. Resources are posted in the form of original content, informational pieces, guest posts, infographics, events, seminars/webinars, or other.

MONTHLY COMMUNICATIONS: AMAC Foundation publishes communications to convey news, Social Security myths, top topics, events, and more.



- Monthly Newsletters are sent via email blasts to ~20K subscribers and can be viewed on the website under Resources



- AMAC Foundation Infographic reaches target audiences via website, social media, and amac.us posts monthly – July 2022, first edition; Dec 2022

INFORMATIONAL POSTS / RESOURCES

- [Why You Should Spend More Time with the Seniors in Your Life](#), March 30, 2022
- [How to Handle Unsolicited Calls](#), April 4, 2022
- [Carrying A Miracle](#), July 25, 2022
- [Bringing Awareness to Suicide Prevention Month](#), September 10, 2022
- [Seasonal Shopping and Spending](#), December 19, 2022

EVENTS

- **SUDDEN DEATH: Are You Prepared?** – Recurring Event, 3-part series held in-person in Lady Lake, FL region several times per year at max attendance.
- **SOCIAL SECURITY OVERVIEW – 2022 Version** – March 3, 2022, Presented by AMAC Foundation SSAS.
- **SOCIAL SECURITY SOLVENCY**, October 25, 2022, Delivered at a resident-only event for a local 55+ community.
- **PROTECTING THE RIGHTS OF SENIOR VOTERS**, November 2, 2022, Collaboration with American Constitutional Rights Union (ACRU) to push out information on vulnerable voter populations.

WEBINARS

- **NEW TO MEDICARE – 2022 Edition** (Webinar; recorded for later viewing)



Dedicated to Serving Those Who Served Our Country

VETERAN OUTREACH

2022 Foundation Veteran Outreach Program (FVOP)

Continued support for America's Veterans is a primary effort of the AMAC Foundation. Efforts were made to revamp Veteran outreach, executing initial stages of Foundation Veteran Outreach Program, also known as FVOP. The Foundation has remained an ongoing designated point of contact for:

- Hiring Our Heroes, A Program of the U.S. Chamber of Commerce Foundation
- Lone Survivor Foundation
- One More Day Veterans Foundation

FVOP established an initial collaborative network of 10 Veteran-related organizations, including sister non-profit AMAC Action. 2022 ended strong with announcements and informational pieces, as well as a salute to a 100-year-old Veteran!

- Introducing AMAC Foundation Veteran Outreach Program (FVOP), December 16, 2022
- FVOP News – Honoring the Life of a Veteran Turning 100! December 25, 2022
- List of Collaborators can be found under the For Veterans page



AMAC FOUNDATION...

has prided itself on maintaining a lean staff, indicative of our conservative approach to ensuring that our services are delivered with strength, efficiency, and effectiveness. With this as a guiding operating principle, partnerships were developed with like-minded organizations wherever possible. These working relationships are leveraged to deliver services based on already established expertise, balancing organizational resources. 2022 working relationships include:

- VITAS Healthcare
- Lake County, FL: Lady Lake Library; Lake County Sheriff Department
- Lady Lake Chamber of Commerce
- Florida Attorney General's Office
- Florida Dept. of Elder Affairs
- American Constitutional Rights Union (ACRU)

We appreciate and thank all who came together to support or join our mission in 2022, to enrich the lives of Seniors across local and nationwide communities.

RECOGNITION, CAMPAIGNS, & GIVING BACK

AMAC Foundation takes pride in reaching out to the community. As a 501(c)3 organization, it relies on its donors to support that mission and annual goals.



CARRYING A MIRACLE - BREATH OF LIFE / CHOOSE LIFE:

AMAC Foundation supported the 2022 Choose Life campaign - delivering over **\$26k** in donations to the Breath of Life Center, NY.

HURRICANE / DISASTER RECOVERY, OCTOBER 4, 2022:

AMAC Foundation took an active roll in response to Hurricane Ian, FL.

2022 BEST OF LADY LAKE AWARD:

AMAC Foundation received the award in recognition for it's service, October 24th, 2022.

PROMOTE ACRU COLLABORATION, WEBINAR, & VOTER INFORMATION:

- Protecting the Rights of Senior Voters (webinar), October 31, 2022.
- Protect Senior & Vulnerable Voters, October 31, 2022.

#GIVINGTUESDAY:

AMAC Foundation participated in #GivingTuesday posts on November 3, 2022 and November 22, 2022.

TESTIMONY & HEARING: US SENATE SPECIAL COMMITTEE ON AGING, NOVEMBER 21, 2022:

AMAC Foundation team assists with research on "Issues Facing Seniors: Retirement Security, Healthcare, & Fiscal Health" for testimony delivered by Rebecca Weber, AMAC Foundation BOD President.

AMAC FOUNDATION GIVES BACK!

- Time for Thanksgiving & Giving, November 30, 2022.
- Santa to a Senior with Bay Pharmacy (Eustis, FL), LovExtension, Inc., a local non-profit.
- Decorated Tree Donation, Sumter Senior Living - Festival of Trees, The Villages, FL.
Proceeds went to American Legion in Lady Lake, Florida - Veterans' Memorial Post.

REACH

AMAC FOUNDATION...

utilizes many avenues to push information out to the public. Throughout the year, there were periodic reviews of the methods, analytics, and partnerships used to extend the reach, specifically with Nonprofit Megaphone.

THE FOUNDATION TEAM engaged in learning some new “behind the scenes” skills to increase the original content, tags in posts, and other search engine optimization (SEO) tips and tricks



WEBSITES

NEWSLETTER

LOCAL
OUTREACH

SOCIAL
MEDIA

EVENTS

WEBSITES:

amacfoundation.org, socialsecurityreport.org + medicarerereport.org

NEWSLETTER:

available via: foundation website or subscription (~20K subscribers)

SOCIAL MEDIA:

active on - facebook, instagram + pinterest

LOCAL OUTREACH:

organizations, events, promotions + networking

EVENTS:

in-person, webinar + seminar/expo

SOLELY, “ASK RUSTY” MEDIA REACHES ACROSS & BEYOND US BORDERS:

- AK, Ketchikan SitNews, Ketchikan, Alaska area, Online
- AZ, Sierra Vista Herald, Sierra Vista, AZ, Daily, 7300 ppl
- CA, Desert Dispatch, Barstow, CA, Daily, 4600 ppl
- CA, Victorville Daily Press, Victorville, CA, Daily, 30600 ppl
- FL, The Villages Sun-Times, The Villages, FL, Daily
- FL, The West Orlando News, Online
- GA, Atlanta Senior Life (magazine), Atlanta, GA, Monthly
- GA, The Telegraph, Macon & Central GA, Daily, 59059 ppl
- KY, The Lexington Leader, Daily, 67715 ppl
- MA, Lowell Sun, Lowell, MA, Daily, 42900 ppl
- MI, South Central MI Senior Times, Battle Creek, MI, 60000 ppl
- ND, Minot Daily News, Minot, ND, Daily, 21000 ppl
- PA, Delaware County Daily Times, Primos, Delaware County, PA, Daily, 31538 ppl
- TX, Marshall News Messenger, Marshall, TX, Daily, 5000 ppl
- WI, Madison Catholic Herald, Madison, WI, 28000 people
- US Navy Dispatch, www.NavyDispatch.com, Online
- Community 99, Jaipur, Rajasthan, India, Online

ANALYTICS

Facebook:

Jan 22

- Reach @ 23,523
- Likes @ 422
- Follows @ 471

Dec 22

- Reach @35,776
- Likes @ 954
- Follows @ 1,256

Instagram

- 113 posts
- 52 followers
- 120 following

Infographic

- Started in July

AF site - Top 10 Page Views

- Homepage (18.1K)
- Audio:
 - o Do you know how SS annual COLA is determined? (14.8K)
 - o Senior talks deciphering the SS maze (14K)
 - o Ask Rusty: My SS income hurts when I file my taxes 5.3K)
- Services; SSAS (12.2K; 4.9K)
- Resources (6.9K)
- Contact (6.5K)
- Events (4.8K)

Social Security Report

- 78.5K Views
- 42.5K Users
- 1.85 views/user

Medicare Report

- 7.8K Views
- 3.9K users
- 2 views/user



FOUNDATION OUTLOOK



BALANCE SHEET

As of December 31, 2022

	Total
ASSETS	
Current Assets	
Bank Accounts	
10000 United Southern Bank - Checking	258,876.22
10000-1 Breath of Life - USB	106.12
Total 10000 United Southern Bank - Checking	258,982.34
PayPal Bank	536.11
Total Bank Accounts	259,518.45
Accounts Receivable	
11000 Accounts Receivable (A/R)	854.72
Total Accounts Receivable	854.72
Other Current Assets	
12000 Undeposited Funds	35,641.88
14000 Inventory Asset	1,646.14
Payroll Refunds	245.78
Total Other Current Assets	37,533.80
Total Current Assets	297,906.97
Other Assets	
18600 Other Assets	
18601-1 Prepaid Businmess Registrations	2,365.00
Total 18600 Other Assets	2,365.00
18700 Security Deposits Asset	250.00
Total Other Assets	2,615.00
TOTAL ASSETS	\$300,521.97
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
20000 Accounts Payable	0.00
22000 Accounts Payable	12,242.16
Total 20000 Accounts Payable	12,242.16
Total Accounts Payable	12,242.16
Credit Cards	
USB Credit Card	4,113.59
Total Credit Cards	4,113.59
Other Current Liabilities	
24000 Payroll Liabilities	
24000-1 Federal Taxes (941/944)	2,707.68
24000-2 FL Unemployment Tax	106.36
PA Income Tax	312.80
PA Local Tax	101.90
PA Unemployment Tax	6.12
Total 24000 Payroll Liabilities	3,234.86
Amounts Held on Behalf of BOL	106.12
Florida Department of Revenue Payable	5.92
Total Other Current Liabilities	3,346.90
Total Current Liabilities	19,702.65
Total Liabilities	19,702.65
Equity	
30000 Opening Balance Equity	31,198.85
32000 Unrestricted Net Assets	408,499.82
Net Income	-158,879.35
Total Equity	280,819.32
TOTAL LIABILITIES AND EQUITY	\$300,521.97

PROFIT AND LOSS

January - December 2022

	Total
INCOME	
43420 Foundation Grants	500.00
43446 Books	79.80
43446-1 Royalty Revenue	237.14
Total 43446 Books	316.94
43450 Contributions	
43450-1 Individual Contributions	39,063.77
43450-3 AMAC Member Donations	192,958.82
43450-6 General Contributions	2,063.00
Total 43450 Contributions	234,085.59
43470 Ask Rusty Demystifying SS	135.60
43470-1 Shipping Income	29.79
Total 43470 Ask Rusty Demystifying SS	165.39
46400 Other Types of Income	0.28
47200 Social Security Program Income	
43456-2 Concierge Service	3,000.00
Total 47200 Social Security Program Income	3,000.00
Total Income	238,068.20
COST OF GOODS SOLD	
50000 Ask Rusty Books	115.60
Total Cost of Goods Sold	115.60
GROSS PROFIT	237,952.60
EXPENSES	
60900 Business Expenses	
60900-1 Hiring Expense	255.99
60900-2 Rent or Lease of Buildings	24,500.00
60920 Business Registration Fees	4,988.32
60931 Membership Fees	346.00
Total 60900 Business Expenses	30,090.31
62100 Contract Services	
62100-1 Accounting Fees	2,450.00
62100-10 Office Cleaning	5,650.00
62103-7 Outside Services	4,800.00
Total 62100 Contract Services	12,900.00
62800 Facilities and Equipment	
62800-1 Computers	2,979.99
62800-5 Repair & Maintenance	95.95
62800-6 Office Equip Repair&Programming	2,141.07
Total 62800 Facilities and Equipment	5,217.01
65000 Operations	
65000-1 Books, Subscriptions, Reference	542.33
65000-2 Education	2,428.75
65000-3 Business Promotions	419.98
65000-4 Postage, Mailing Service	1,683.09
65000-5 Printing and Copying	11,044.07
65000-7 QuickBooks Online	860.00
65000-8 Website	295.80
65000-9 Insurance - Liability, D and O	2,858.54
65001-1 Advertising/Promotional	7,323.57
65001-2 Office Supplies	1,763.22
65001-5 Internet Service	13,462.30
Total 65000 Operations	42,681.65
65050 Software Expenses	3,913.88
65070 Programs & Workshops	1,062.94

PROFIT AND LOSS

65080 Concierge Expenses	
65080-1 Concierge - Meals	123.83
65080-2 Concierge - Travel	1,032.76
65080-3 Concierge - Hotels	501.81
Total 65080 Concierge Expenses	1,658.40
65100 Other Types of Expenses	17,500.00
65100-1 Bank Fees	61.36
QuickBooks Payments Fees	3.27
Total 65100-1 Bank Fees	64.63
65100-4 PayPal Fees	339.42
65100-5 Other Costs	673.02
65100-9 Meals and Entertainment	434.45
Total 65100 Other Types of Expenses	19,011.52
66000 Payroll Expenses	363.05
66000-4 Processing Fees for Paychex	146.25
66000-8 Intuit Payroll Fees	2,337.74
66003 Accrued Payroll - Wages	10,716.92
66004 Accrued Payroll Taxes	1,005.59
Taxes	21,465.43
Payroll Tax Penalty	0.12
Total Taxes	21,465.55
Wages	259,051.17
Total 66000 Payroll Expenses	295,086.27
67000 Employee Benefits	192.77
68000 Travel	
68000-1 Travel Meals	205.91
68000-2 Travel Hotels	574.20
68000-3 Travel	1,341.83
Total 68000 Travel	2,121.94
Meals and Entertainment	395.26
Total Expenses	414,331.95
NET OPERATING INCOME	-176,379.35
OTHER INCOME	
46500 Donated Rent Revenue	17,500.00
Total Other Income	17,500.00
NET OTHER INCOME	17,500.00
NET INCOME	\$ -158,879.35

FINANCIAL OVERVIEW

2021

2022

REVENUE/CONTRIBUTIONS

Contributed Revenue/Donations	\$412,905	\$234,586
Earned Revenue	18,814	20,867
Total Revenue/Contributions	\$431,719	\$255,453

EXPENSES

Program/Payroll	\$159,880	\$295,086
General & Administrative	102,820	119,246
Total Expenses	\$262,700	\$414,332

NET ASSETS/EQUITY & LIABILITY

Change in Net Assets	\$175,941	(\$140,496)
Beginning Net Assets	224,073	400,014
Ending Net Assets	\$400,014	\$259,518



OPERATIONS OUTLOOK

THROUGHOUT 2022, THE AMAC FOUNDATION SAW A SIGNIFICANT DROP IN CONTRIBUTIONS COMPARED TO PRIOR YEARS WHILE ABSORBING OFFICE EXPENSES THAT WERE PREVIOUSLY SHARED. EVEN DURING INFLATION AND HARD ECONOMIC TIMES, THE TEAM CONDUCTED FUNDING CAMPAIGNS, INCLUDING COMBINING #GIVINGTUESDAY / END OF YEAR APPEAL THAT SAW AN INCREASE IN DECEMBER DONATIONS OVER PREVIOUS MONTHS.



In 2023, the Foundation team will continue to realize its potential, seek out opportunities, and develop strategies for operation and expense reductions. Oversight will be ongoing, identifying adjustments to in-house / office costs, while growing through outreach, grants, and donor management, including investing in a donor management program.



AMAC Foundation

Supporting & Educating America's Seniors

2023 PROGRAM GOALS

AMAC FOUNDATION

ANTICIPATES ADDING RESOURCES AND PROMOTIONAL CONTENT ACROSS THE BOARD.

2023 GOALS INCLUDE:

- Hold the 2023 Social Security Seminar, with presentations by the AMAC Foundation's SSAS advisors.
- Execute the 2023 Aging at Home Expo, engaging the local community with approximately 15 exhibitors/vendors and 4 to 5 speaking slots for breakout sessions on related topics. AMAC Foundation will deliver information on maintaining connections with the outside world.
- Launch the Ask Rusty "Gen X Spotlight Series", featuring Russ Gloor and Jeff Szymanski of AMAC Action, talking on trending topics that interest America's upcoming retiree generation.
- Continue to collaborate, enhance, and expand FVOP through internal expertise, outreach, published content, and resources. AMAC Foundation prioritizes supporting America's Veterans.

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AMAC FOUNDATION



LEADERSHIP

EXECUTIVE LEADERSHIP



JOLEEN TENINTY, EXECUTIVE DIRECTOR

With an extensive array of managerial and professional research experience complementing her recent background in the operation and direction of a major community organization, Joleen steps into the role of AMAC Foundation Executive Director with a clear mission to continue the Foundation's growth in support of America's seniors. Indeed, her wide-ranging understanding of training and development at many levels equips her with

the tools needed to advance the Foundation's brand and to continue the organization's development as a substantial, world-class concern.

Joleen's academic background (MBA and BS-Biology) and her years of hands-on experience assisting in the professional career development of others, along with the teaching and tutoring skills she's compiled over the years, will serve her well in her role at the Foundation. Likewise, her successes in event planning and organization, community outreach, and project development equip her well to join the exceptional Foundation team. She has also achieved her National Social Security Advisor (NSSA) accreditation at the end of 2022.



GERRY HAFNER, EXECUTIVE DIRECTOR, EMERITUS

After earning his A.S. Computer Science from Pierce College in Philadelphia, Gerry began what would be a 30-year career in the Electric Utility Industry in Pennsylvania and New Jersey. Along the way, he

completed his bachelor's degree in Business Administration at Alvernia University in Reading, Pennsylvania, graduating Magna Cum Laude in 1992. Retiring as Information Technology Director for the utility, he served as Development Director for a manufacturing consortium in Pennsylvania, and then embarked on a second career as Business Manager for a regional law firm in central and southeast Pennsylvania. In Florida, he has served as a Consultant and Adjunct Instructor at Lake-Sumter State College and the College of Central Florida. In addition, he served as a Consultant at Sumter Electric Cooperative, handling a variety of management training, professional development, and technical responsibilities. Since 2012, he's been providing consulting and professional services to the AMAC organization and the AMAC Foundation. He is an accredited Social Security Advisor, having achieved NSSA credentials in 2016.

PAULETTE MCBRIDE, EXECUTIVE ADMINISTRATIVE ASSISTANT

Paulette's background includes 20+ years of experience in office workflow organization and administrative support. Her professionalism and eagerness to interact with the partners we deal with in our Foundation's day-to-day service to the community, and her desire to assist callers, equip her well to serve our senior constituency. Her computer skills include Office 365, Microsoft Outlook, Microsoft Teams, and Zoom. As Executive Assistant for the Foundation, she supports the Executive Director, the staff, assists/directs in-coming callers, coordinates meetings, seminars, and luncheons on the Foundation's behalf. Paulette has an Associate of Arts Degree in office administration and resides in Wildwood, Florida.

BOARD MEMBER BIOS



REBECCA WEBER, PRESIDENT

Rebecca Weber is a Chartered Property Casualty Underwriter (CPCU). Along with her substantial career involvement in the insurance industry, she has been able to apply her strong sense of values to the formation and development of the Association of Mature American Citizens (AMAC).

With AMAC, Rebecca in 2007 spearheaded the development of a local merchant network program, working with third-party vendors to offer exclusive discounts, benefits, and services for AMAC Members. Also, through Rebecca's efforts, AMAC members can take advantage of discount insurance rates with various insurance carriers for life, auto, home, long-term care, and ancillary insurance products.

In 2011, Rebecca formed AMAC Senior Resources Network, Inc. as a vehicle to offer AMAC members guidance and choice with their health-care insurance options.

Rebecca is Editor in Chief of the AMAC Advantage, the magazine of The Association of Mature American Citizens, and spearheads AMAC's business development and employee training initiatives. Her strength of character and sense of commitment are driving forces in AMAC's rapidly developing success.



JUDITH WEBER, VICE PRESIDENT

As a co-founder of AMAC, Judy Weber has worked alongside her husband in the creation and development of the AMAC organization. Sharing both Dan's beliefs and his commitment, Judy has been a key participant in the growth and stability of AMAC. With her extensive background in financial planning and financial management, she has been instrumental in managing the

Foundation's fiscal operations. Applying her skills in a hands-on environment, she has created a solid financial platform that has enabled the organization to successfully navigate the start-up waters. Judy's organizational and administrative skills will be instrumental as the Foundation develops and as services are deployed.



DAVID WEBER, TREASURER

Dave Weber is one of the key driving forces behind the Association of Mature American Citizens. Since 2007, he has labored passionately to build the foundation of what has emerged as a leading advocate for America's older citizens and has made enormous personal commitments to AMAC's mission. A large part of Dave's present role with AMAC includes acting as Chief Marketing Officer, creating new benefits for members, such as AMAC's Roadside Assistance and Auto Insurance programs, and developing and maintaining relationships with AMAC's business and service partners. Dave also leads the efforts of AMAC's

Membership Services and Information Technology teams, both of which are key to the organization's thriving operation. Dave's work with AMAC, coupled with his belief in the free enterprise system, has helped position the organization in the forefront of advocacy for America's seniors.



KURT A. MEYER, SECRETARY

Kurt Meyer is Vice President of Strategic Partnerships & Membership Services for AMAC, and in this role coordinates much of the interaction between AMAC and external entities seeking to establish business ventures with the organization. With 25 years of corporate management experience in the defense, finance, and dental insurance sectors, Kurt has progressed through

a variety of management and executive positions during the development of a career rich in entrepreneurial spirit and business leadership. During his career, Kurt has held executive positions at Grumman Aerospace Corporation, Chase Manhattan Bank, Union Bank of Switzerland, Brighton Credit Corporation, ArcLoan.com, and EDP Dental Plan before forming the Strategic Business Network, Inc, a management consulting company, in 2006. He is a 1984 graduate of C.W. Post Campus of Long Island University.



SANDRA SINAGRA

Sandra brings with her a wealth of experience in the non-profit environment, most recently concluding a 15-year tour of duty with Kingston, New York's Health Alliance Foundation. Her final position at the Foundation was that of Director of Foundation Relations, where she was responsible for a wide variety of administrative duties, including special event coordination, program development, board communication support, and a host of related administrative functions. In her position at Health Alliance Foundation, Sandra coordinated communications between a variety of offices and related contact points, interacting

regularly with Alliance personnel in multiple locations. She also served as the AMAC Foundation's Executive Assistant from 2016 until her retirement in 2020.



JOHN GRIMALDI

John Grimaldi began his career as a reporter for the Associated Press and subsequently joined the pioneering public relations firm of Carl Byoir & Associates in New York where he was a group Vice President. He served for a period as part of the first non-partisan communications department in the New York State Assembly (he was Press Secretary to the Speaker for Membership Affairs). Subsequently, Mr. Grimaldi became a member of the Board and Executive Vice President of the Braun & Company, a leading international business and public relations consultancy. He is a founding member of the Board of Directors of Priva

Technologies, Inc. and he has served for more than thirty years as a Trustee of Daytop Village Foundation, which oversees a worldwide drug rehabilitation network.

JOHN CAFFREY

John Caffrey, CFP® certificant, has worked in the financial services industry since May of 1985. He is a graduate, Cum Laude, from the State University of New York Oswego with a Bachelor of Science Degree in Accounting and a Minor in Economics. John is the owner of Castle Financial Advisors, LLC and Castle Asset Management, LLC an independent, SEC regulated investment advisory firm. He has dedicated his career to furnishing a full range of services and products with a proven record to his clients. Thorough and innovative, John has helped hundreds of professionals, high net worth individuals and business owners attain financial independence. John is a CERTIFIED FINANCIAL PLANNER™ certificant. He received his designation through study with the College of Financial Planning in Denver, Colorado in July of 1988. John is a member of the Financial Planning Association. He is a registered representative of Purshe Kaplan Sterling Investments. John is one of the Founders and currently sits on the Board of Directors, of Empire National Bank, located in Islandia, NY.

MAUREEN OTIS

Maureen Otis is the president and co-founder of American Caging, Inc. (ACI). ACI specializes in providing caging, data entry, escrow/accounting, fulfillment and file maintenance services to for-profit and non-profit organizations, their professional fundraisers, and consultants. As president, Maureen is responsible for all company operations. Additionally, she provides legal assistance in matters related to fund raising and contract review. Maureen also provides legal representation for corporate formation; preparation and filing of applications for exemption from Federal income taxes; contract preparation; and assistance with written and verbal disclosure requirements. Additionally, the law firm provides assistance with other types of fund raising-related registration including the Combined Federal Campaign and America's Charities.

M. FAVIL WEST

Favil West is a co-founder and President of The Foundation Assisting Seniors, a Henderson, Nevada-based organization. In addition to his Foundation efforts, Mr. West has extensive experience in the non-profit world, having served as President of Rotary and as a member of the Rotary Foundation and a director of the KM Foundation, Kiwanis Foundation, and Bravo Ministries. As a Rotarian, he has been recognized as a Paul Harris Fellow. Mr. West's civic activities include extensive participation in the Sun City Anthem Community Association, where he served as President of the Board of Directors from 2003 to 2007. He is a recipient of the Henderson Chevrolet Shining Star Award (2013) and the Acts of Kindness Award (2014) and was named Nevada Senior Citizen of 2015. His civic work also included stints as Vice Chairman of the Nevada Commission of Common Interest Communities and Condominium Hotels, Chairman of the Clark County Committee on Helicopter Noise, Chairman of the Anthem Oversight Committee, Chairman of S.H.O.U.T., and membership on multiple City of Henderson Committees.



AMAC Foundation

Supporting & Educating America's Seniors

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