

matheny**matters**

Fall • Winter 2025

**Your Generous
Giving Keeps
Matheny
Growing**



Nancy Hamstra
President and CEO



At Matheny, we are surrounded by generosity every day—generosity of spirit, of time, and of resources. It is the foundation on which our mission stands. This issue of *Matheny Matters* celebrates the many ways philanthropy helps us provide exceptional care and meaningful opportunities for the children and adults we serve.

Philanthropy is more than a donation—it's a partnership. Every gift, large or small, helps us enhance programs, invest in adaptive equipment, and create experiences that enrich lives. We are deeply grateful to our donors, families, staff, and community partners who continue to believe in and support Matheny's mission.

As we look ahead to Matheny's 80th anniversary in 2026, we are filled with gratitude and excitement. For eight decades, Matheny has stood as a place of compassion, innovation, and possibility. The generosity of our supporters has

**Together, we are
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where every person
at Matheny can
learn, grow, and
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allowed us to grow from a small family dream into a statewide leader in care, education, and advocacy for people with complex disabilities. The next chapter of our story will build on that proud legacy—ensuring that future generations of Matheny students and residents continue to thrive.

As you read these stories, I hope you'll see how far your kindness reaches—from our classrooms and therapy centers to art studios and group homes. Together, we are building a future where every person at Matheny can learn, grow, and share their unique gifts with the world.

Thank you for being part of the Matheny community and for helping to make our work possible.

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Peapack, New Jersey

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On the cover: Shannon Sullivan and son, Will Sullivan, a Matheny School student and a resident at Matheny

Photo by Keith B. Bratcher, Jr.

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Matheny School Graduation

Congratulations to the class of 2025, whose members were awarded their hard-earned high school diplomas on June 20th at a joyous ceremony and celebration, shared with family, friends, school staff, and other well-wishers. This year's proud graduates are: Ryan Kleiber; Brent M. Ziering; Patrick Marchesani; Lauren McNerny; and Jacob Rolaf.



Top right (l-r): Dr. Vincent Barba, Vice President of Patient Care & Safety, CMO & Safety Officer; Assemblywoman Nancy Muñoz; Matheny President and CEO Nancy Hamstra; Somerset County Commissioner Sara Sooy

A Generous Appropriation

The New Jersey State budget for fiscal year 2025 included an appropriation of \$450,000 for Matheny to replace its HVAC system. Matheny is sincerely grateful to Nancy Muñoz—an assemblywoman since 2009, who has served as Republican budget officer since January 2024 and is one of the Assembly's most knowledgeable members on health care—for championing this generous appropriation. Matheny also thanks Assemblywoman Muñoz for joining us at this year's high school graduation ceremony on June 20 and serving as our keynote speaker.

The Arts Happen Here

We thank New Jersey State Council on the Arts for awarding an increased \$111,110 grant for fiscal year 2025 in support of Matheny's Arts Access program. The Council's mission is to support, encourage, and foster public interest in the arts; enlarge public and private resources devoted to the arts; promote freedom of expression in the arts; and facilitate the inclusion of art in every public building in NJ. Matheny's Arts Access Program is designed to inspire, uplift, and encourage the aspirations of artists living with disabilities.



The Shamrock Shuffle

How a Family and Their Foundation Keep Moving Forward

Shannon and Terry Sullivan, whose son Will goes to school and resides at Matheny, established the GoodWill Foundation in 2011. Over the years, this family foundation has raised more than \$500,000, which they have donated to local nonprofits, including Matheny, that care for children with special needs.

When Will Sullivan was born in 2008, his parents, Shannon and Terry, knew nothing about Angelman Syndrome. Nor were they aware on the day of their first child's birth, and for many months thereafter, that Will had a genetic disorder that would cause lifelong debilitating issues. Will's diagnosis came later, after he had missed several developmental milestones of early childhood, such as sitting up and rolling over, which parents happily anticipate.

Genetic testing when Will was 18 months old identified a gene deletion on chromosome 15. The diagnosis was Angelman Syndrome, which over a lifetime causes intellectual disability, absent speech, difficulty walking and other motor problems, neurological issues including frequent seizures, and severe sleep disorders. There is currently no cure.

At first, Will's parents were too stricken to take any action. "We didn't anticipate this," says Terry. "The emotional distress when you are given a diagnosis like this is devastating. I could never have imagined how devastating the news would be."

"I went through various strong reactions—first denial and then phases of raw emotion."

But when months went by, and those initial strong emotional reactions dissipated a bit, Terry says: "We got energized, and became motivated to find a

cure for him. We chased down doctors we hoped could help Will. 'He's young,' we thought. 'There's still hope of turning this around.'"

Shannon and Terry met at Villanova University, married after graduating, and

went to live in New York City. They were young—just starting out—when Will was born.

Many months after Will's diagnosis, following that surge of energy to track down a cure, Terry says: "We had to face how we were going to live our lives. How would we manage with all of the things Will couldn't do? How would we find acceptance for him? What would Will's life-trajectory be—and ours? We struggled and ultimately started to figure out how we, as a family, could start to move forward."

Will is now 18 years old, living at Matheny's residential hospital, and attending the Matheny School; and he has two sisters, Kendall, age 17, and Payton, age 16. He lived at home until 2020. "Will has limited motor skills, takes medication for seizures, communicates with hand motions and signals, and needs 24-hour-a-day care," says Shannon. "He can't walk and he can't feed himself."

At age 12, when Will moved onto Matheny's Peapack campus, he also



Will Sullivan, a Matheny School student and Matheny resident



Top: Terry Sullivan and son Will Sullivan participate in Miles for Matheny on the Peapack campus.

Bottom: Will Sullivan (center) enjoys participating in Miles for Matheny with family and friends.



Angelman Syndrome; and I started our own Foundation, GoodWill, to tap our network in order to raise awareness and funds for FAST and Will's educational programs," Terry explained in an article he wrote for the FAST newsletter.

Because Angelman Syndrome is categorized as a "rare disease," affecting approximately 1 in 15,000 newborns worldwide, awareness and research funding have historically been low; and consequently, research into new treatments, and ultimately preventatives, has moved slowly. Currently, there are several drugs in clinical trials.

The year 2011 was a more favorable year for the Sullivans. They established their family foundation, with Terry as the president and founder, and Shannon heading up the major fundraising event held each year.

In the article entitled "Running Fast—A Father's Perspective on Channeling the Emotions Angelman Syndrome Can Stir," published in the FAST newsletter in 2011, Terry shared his philosophy and approach at that time.

"Becoming proactive essentially required leaving a comfort zone," he says. "We had to let a lot more people know about our personal emotions and challenges regarding AS and we had to ask people for support, something we've never been good at."

"We raised \$40,000 for FAST and Will's school (at that time). In the last few months, I've been contacted by several friends who are interested in leading events to benefit GoodWill. And finally, 3.5 years post-diagnosis, I added an unforgettable moment I didn't actually want to forget," he wrote in the article. That "moment" was Terry's triumphant completion of the New York City Marathon, after training hard and diligently, and supported emotionally and financially by friends and family.

Since that "winning moment," Terry and Shannon Sullivan's GoodWill Foundation has raised \$500,000, all of which has been donated to schools,

camps, and afterschool programs. The Foundation's mission is to "raise funds and awareness for the special needs community." According to Shannon, their fundraising efforts have been a combination of larger events, such as Terry's running the NYC and NJ Marathons three times, and smaller ones, such as carwashes, lemonade stands, and a viewing of an independent movie release.

In the past few years, the Foundation has put most of its time and energy into a flagship event called the Shamrock Shuffle. Held on a weekend each Spring, Shannon says it's a modest effort (mostly friends, family, and local businesses) but it's fun and brings people out to have a good time and to raise money and awareness. Her friends help with all aspects of the event—such as getting sponsors, signing up participants, and selling special apparel and other items. And the commitment to "do Good for Will" goes on. Shannon added, "It's been particularly energizing to see kids in Will's age bracket become more involved in the event. Our hope was always to see these kids develop compassion for the special needs people in their community."

Will at 18 is "very social," says his mother. "He likes to interact with others and is very attached to his aides at Matheny, and to several other residents. He enjoys school, and loves visits and car rides with his family." And the GoodWill Foundation continues to raise funds and gives generously to Matheny and other nonprofits, making day-to-day life better for children with Angelman and other developmental disorders.

Meanwhile, the search for cures and effective treatments for Angelman also moves forward—resulting in several current clinical trials that may "do good" for kids like Will and also for their families, who walk the walk with their kids every single day. **MM**

For more information on donating to the GoodWill Foundation, please contact Terry and Shannon Sullivan at tfsjr25@yahoo.com, or email Matheny's Development Office at development@matheny.org or call (908) 234-0011, extension 1260.

transferred into the Matheny School. "He was getting bigger and was more difficult to manage," Shannon says. "And he was often frustrated because he couldn't communicate and that resulted in certain behaviors, like pulling hair. He also wasn't sleeping much—at the most four hours a night." The family had a special bed constructed for him to ensure his safety. But his sisters, who have never known life without Will, have always been helpful and kind to him, Shannon says.

"A diagnosis like this can be so emotionally and financially draining on families," Terry says. But years ago, when Terry got past his initial reaction to Will's diagnosis, he says he took two big, important steps.

"I became a Board member of FAST (The Foundation for Angelman Syndrome Therapeutics, the leading patient advocacy organization working to cure Angelman syndrome), intrigued by the passionate drive...of the Board to simply focus all efforts on finding a cure for

A **Fund** That Makes Life Richer

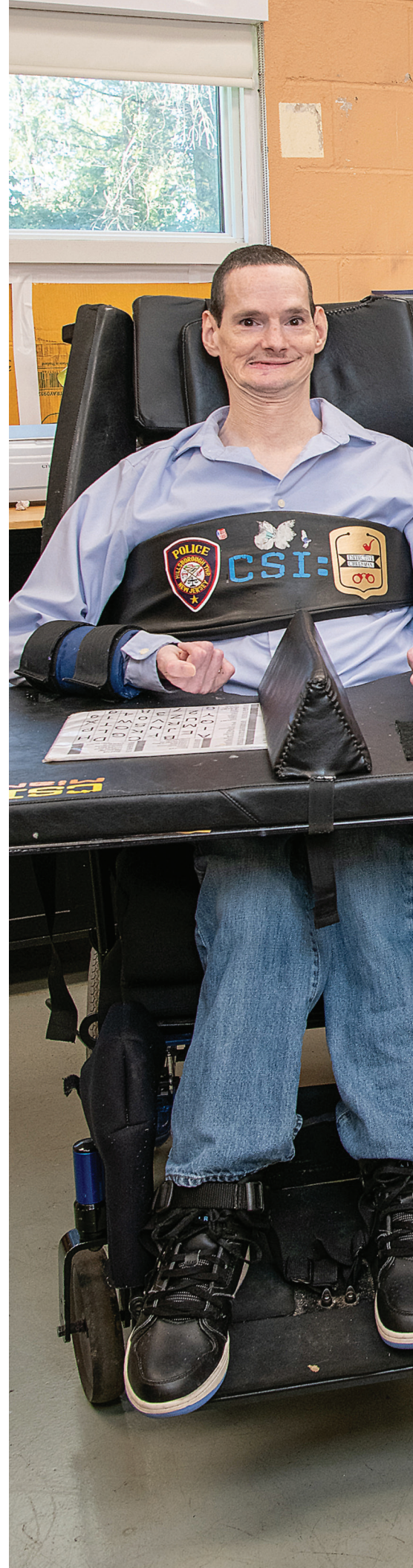
At the Hillsborough Adult Learning Center, Life Enrichment Therapies are the “name of the game,” so to speak. Most of the 40 or so adults, who attend the Hillsborough program from 9 AM to 3 PM each weekday, live in one of seven Matheny community residences in several towns in Somerset and Warren counties. Many are graduates of The Matheny School, continuing their relationship with Matheny, and their school-based friendships, into and through their adulthood.

All have multiple medical and developmental complexities. They arrive in specially outfitted vans, using wheelchairs to get around, and all are eager for the day’s activities to begin. Some can speak. Others cannot, but have learned to communicate using physical cues and adapted communication devices. They all share a love for their weekday pursuits—getting out of the house, meeting up with Hillsborough Center participants and staff, having interesting things to do, continuing to learn new skills and information, interacting with the larger world. It’s a place where deep friendships are formed and last a long time.

In addition to offerings such as adapted sports; exercise and fitness activities; yoga and meditation; karate; advocacy initiatives; cooking; acting; and time spent independently (with instructor assistance) on computers equipped with

special switches and assistive technology in the Center’s computer lab, almost every week has a special event or trip planned. Excursions to the mall, local community libraries, and restaurants; a day in the park; fishing trips; outdoor BBQs; birthday breakfasts; musical performances, such as last month’s onsite concert by the New Jersey Intergenerational Orchestra and November’s planned flute quartet performance; Casino Day; pizza parties, a magic show in October—even playing the Center’s life-size re-creation of the board game Battleship.

“The staff works hard to make things interesting and lively,” says Todd Demerer, a recreation therapist for more than 25 years and Director of the Hillsborough Center. He witnesses firsthand, every weekday, the value of providing what has come to be called life enrichment therapies, or LET.





Hillsborough program participants Chet Cheesman and Maryanne Phillips, with staff member Sue Antelis, learn to use the 3-D printer purchased with funding from the Lisa Kraus Life Enrichment Therapy Fund.



The Hillsborough Center is one of two such day programs offered by Matheny—the other happening on the Peapack campus, and including both children and adults who live in the residential hospital because of their medical complexities. Both programs focus on “providing quality of life services to clients, aiming to offer all clients as many opportunities as possible,” according to Sean Bielefeldt, Vice President of Life Enrichment Therapies and Community Living at Matheny. The seven community residences, the two adult day programs, transportation services, and recreation therapy and music therapy are all under his watch.

Meghan Francisco, Matheny’s Manager of Recreation Therapy and a 15-year employee at Matheny, explains that the overall goals of recreation therapy are to improve the physical, social, and cognitive functioning of clients. At Matheny, she says, “we are always looking for new and fun ways to improve the resident’s life.” Each resident is assessed, and goals and objectives for that individual are mapped out.

“We ask, ‘What does the resident need to work on?’” she says. “A big part of our job is helping residents with community integration.”

Attending a Yankees game, Disney on Ice, and a Beyonce concert; overnight trips to Wildwood, Great Wolf Lodge, and New York City; Thursday night dinner out; visits to the Bergen County Zoo, The Land of Make Believe, Seaside and Point Pleasant boardwalks, Wind Creek Casino in Bethlehem, PA, Liberty Science Center, and the American Dream Mall are among the wildly popular excursions that have been made over the years by small groups of Matheny residents. And on-site, the annual formal prom, camp-outs in tents and outdoor movies, BBQs, a wildlife show, and a Halloween haunted house—are all great favorites, she says.

“If we have a request, we try to make it happen,” says Francisco. “I love that about Matheny. It makes us stand out from other programs.”

According to Deremer, many of the activities, events, and special purchases, such as the new 3-D printer at the Hillsborough Center and classes for those

who want to learn how to use it, are only possible because of donations to the Lisa Kraus Life Enrichment Therapy Fund, made by Matheny families and other supporters. (See sidebar.) And, of course, the annual generous funds from The Friends of Matheny volunteer group, now totaling more than \$4 million, have made and continue to make a huge positive impact in the day-to-day lives of everyone at Matheny.

"You know about our Wish Lists that we submit to The Friends every year?" Francisco asks. "We make specific requests on behalf of Matheny residents and students, and The Friends provide

"I'm very grateful for the fishing, for the fun we have, for all the staff that help us out every day. Thank you for all the opportunities."

JOSHUA HANDLER

LONGTIME MATHENY GROUP HOME RESIDENT

funding for these items and activities." An adapted beach wheelchair, adapted bicycles, an adapted kayak, the 2016 Disney venture, winter holiday gifts for everyone, and a buffet breakfast at the annual Miles for Matheny are just a few of the items and activities that she names.

For Joshua Handler, a long-time Matheny group home resident and participant in the Hillsborough Adult Learning Center, a beautiful morning spent fishing with two other residents says it all. "I'm very grateful," he says, "for the fishing, for the fun we have, for all the staff that help us out every day."

"Thank you for all the opportunities. There's no place better than Matheny in what they do." **MM**

The Lisa Kraus Life Enrichment Therapy Fund

Lisa Marie Kraus was born on January 10, 1969 in Plainfield, NJ. She was the daughter of William D. and Rosanne Kraus, and sister to William A. and Peter Kraus.

Lisa was developmentally disabled from birth, and following her diagnosis, community members helped Lisa's family provide daily in-home therapies to help her reach her maximum potential. As she grew into adulthood, she developed a spirited personality and an ability to bring people together.

Until 2023, Lisa was cared for by her parents in her family home, a loving and nurturing environment. She loved holidays when the house was filled with family and friends, and enjoyed her mother's cooking and her father's reading her one book after another. She loved playing with her brothers while growing up and visiting with them as adults. Long walks in her wheelchair brought her great peace and joy. She had a great laugh.

In 2023, Lisa moved into Matheny's group home in Far Hills, where she made new friends and received extraordinary care. She died peacefully in her home on Saturday, February 17, 2024, from complications of bladder cancer. She was 55.

Her brother, Bill, who has been a member of Matheny's Board of Trustees for 22 years, and was its Chair/Co-Chair for five, was moved by the concern, and love, of Matheny's staff for his sister.

He says, "At my sister's wake in February, so many members of the Matheny family paid their respects. Toward the end of the evening, a small group of people arrived with one of my sister's housemates – they were the DSPs (direct support professionals) from the Far Hills group home where Lisa lived. Touched that they would make this trip, my family and I thanked them for the care, attention, and love they showed Lisa, especially during those last few weeks. Their response was both unanimous and heartwarming – for them this wasn't a 'job,' it was a 'calling.' To know that my sister was cared for so deeply by such wonderful people was a great comfort.

"Of course, it wasn't just the DSPs who committed themselves entirely to my sister—it was nurses, physicians, aides, team members from Hillsborough, Peapack, and Far Hills. In fact, weeks after Lisa passed, my family and I were invited to a celebration of life at the adult day center in Hillsborough. The program was thoughtful, sensitive, and uplifting...I can still hear the music therapist singing You've Got a Friend in Me, from Toy Story 2. There wasn't a dry eye in the room.

"By then, I thought I had seen the best Matheny had to offer. I have cherished my years on the Board of Trustees, and especially my years as Board Chair/Co-chair. But the announcement of the Lisa Kraus Life Enrichment Therapy Fund as a way of thanking me for my years of service...well, words cannot describe my sincerest gratitude. My family and I will be forever touched by your kindness and generosity."

To give a donation to the Lisa Kraus Life Enrichment Therapy Fund, contact Aimee Hunnewell, Matheny's Chief Development Officer, at ahunnewell@matheny.org, or call her at (908) 234-0011, extension 1275.



Bill Kraus, a longtime Matheny Board of Trustees member, with his sister, Lisa Kraus



Meet Kerry Conmy

New President of The Friends of Matheny

Kerry Conmy, the new President of the beloved volunteer group, The Friends of Matheny, has great respect and admiration for The Friends' long tradition of successful fundraising on behalf of Matheny's students and residents. She hopes the group will continue the vital role it has played at Matheny during its more than four decades of service.

Kerry Conmy, the new President of the well-established and much beloved fundraising group, The Friends of Matheny, or more informally just "The Friends," is an old hand at volunteering her time for important causes. Her commitment to volunteerism goes back almost two decades—and includes her husband and long-time fundraising partner, Jim Conmy.

A little family history first: The Conmys met while students at the University of

Scranton. They graduated in 1990 and married in 1994. The couple has raised three children together—Seamus, born in 1998, Catherine, born in 2000, and Patrick, born in 2003, who currently resides at Matheny's residential hospital on the Peapack campus.

He "was born a beautiful baby," his mother describes, "but he had complications from the start." Because of their experience with his two older siblings, Patrick's parents saw very early on that he

was not hitting the expected milestones, such as sitting up, crawling, and saying first words. "But doctors couldn't find what was wrong. He actually did not receive a diagnosis until 2017," Kerry says.

In 2006, she and Jim were approached by a group of their family and friends, who proposed holding a fundraiser to help the Conmy family with the many additional expenses that come with raising a child with developmental and medical complexities. Instead, the Conmys proposed a nonprofit foundation to help families of children with disabilities. Named in Patrick's honor, Patrick's Pals was founded in 2008.

The foundation is thriving, recently hosting its 17th annual golf outing. Over the years, it has raised more than \$2 million to help purchase therapies and equipment for many children whose families could not otherwise afford these items and activities, and has donated generously to Matheny.

The history of The Friends of Matheny is also a story of dedication, hard work, and generosity. Established in 1983 by a small group of determined individuals from the communities surrounding the Peapack campus, The Friends have persisted in their mission, raising and donating more than \$4 million to enrich the lives of Matheny's students and residents.

Most of the funds have been generated through the highly successful Second Chance Thrift Shop in Gladstone, which features a wide array of items and has built a loyal following of shoppers. The earnings generated by The Friends have purchased high tech communication devices and adaptive athletic equipment; musical instruments; tickets to major league sports events, concerts, and live theater; a wheelchair washing machine; and a five-day excursion to Disney for several students and their caregivers, to name just a few. The Friends also underwrites annual holiday celebrations and on-campus events that enrich the day-to-day lives of Matheny's students, residents, and staff.

The paths of the Conmy family and The Friends of Matheny began to converge when Patrick became a student at The Matheny School. "When he was

Top: Kerry Conmy and The Friends of Matheny present a \$150,000 check to support special items, activities, and events for Matheny's students and residents.

Below: The Conmy family: parents Kerry and Jim, and children Seamus, Catherine, and Patrick, a Matheny School graduate and Matheny resident

kindergarten age, we looked at three schools," remembers Kerry. "We felt so comfortable at Matheny, there was such a great sense of community, that we chose the school right off."

At age 6, Patrick became a day student at the Matheny School, which "became an extended family for him," says his mother. He has learned to express his wishes and needs with nonverbal cues such as nodding his head for yes or no, and raising his eyebrows, and can access some technology by using adapted switches.

"Patrick loves music and loves to have books read to him," says Kerry. "He enjoys humor—he has a little funny side—and really enjoys being with people, especially his brother and sister, whom he adores. He made friends at the Matheny School."

At age 19, when his parents felt he was ready to begin his adult life outside of their home, Patrick moved onto Matheny's Peapack campus, where he lives in the residential hospital because of medical complexities. In 2024, at age 21, he proudly graduated from the Matheny School and subsequently became a participant in Matheny's Adult Day Program on the Peapack campus.

"When it came time for Patrick to move out of our home, we said 'Matheny, of course.' Matheny was already a part of his everyday life; he had friends there and felt very comfortable." The Conmys visit him often at Matheny, taking him out for walks on campus or in the park, and frequently bring him home to spend time with the family.

For Kerry, who took on the role of President of The Friends on July 1, Matheny feels like a second home, too. While raising three children and heading up Patrick's Pals have taken up most of her time over the years, Kerry, who has been involved with The Friends for the last 10 years as a member of their Board of Directors and also served as a member



of the Matheny School Board of Directors for five years, will now fill The Friends' top leadership post.

What's on her mind as she takes on this important role?

"The Friends has such a long history of contributing to Matheny, and people really enjoy being part of the group and part of Matheny. It's so rewarding," she says. "One thing I'll focus on is bringing in some new members, expanding the group, so no one person is too burdened."

She expresses an enormous respect and admiration for those who have led The Friends' activities over the years by serving on the Board and to all of those who have staffed and worked so hard to make the Second Chance Thrift Shop such a success. She wants to ensure that everyone who has contributed to both groups continues doing what they have done so well. Any new endeavors, she states, will be aimed at building upon The Friends' many strengths, while simultaneously making it a bit easier on its core group of devoted members.

"Both the Board members and those who staff the thrift shop give so much of their time to volunteering," she states. "I would like to be able to lighten the load for everybody. There may be ways of doing that while continuing to earn as much as they do now, or even more."

"The Friends has a deep-rooted history and has established a meaningful,



strong collaboration with Matheny," she says. "I'm optimistic that this group will continue to flourish and grow in new and exciting ways." **MM**

If you are interested in becoming a member of The Friends of Matheny, or donating to The Friends, go to friendsofmatheny.org/contact-us and fill in the short contact form provided there.

Volunteers Are Most Welcome Here

The tradition of volunteering is super strong at Matheny, and it promises to continue and grow in the upcoming months. According to Outreach and Events Manager Julia Halsey, who started in her newly expanded position in April 2025, Matheny not only welcomes, but counts on, individuals and groups who donate their time, whether that's several hours dedicated to a particular project or on a regular, ongoing basis.

Matheny's longest-running volunteer group, The Friends of Matheny, with more than 40 years of service under its belt, is still going strong, according to Halsey, and has made, and continues to make, a significant difference in the lives of residents and students. Sales from its highly successful Second Chance Thrift Shop in Gladstone have underwritten the annual "wish lists" submitted by staff on behalf of patients, residents, and students through the years, and this year is no different.

Halsey says that The Friends rarely turn down a request and she's thankful that most of this year's wish list items were funded, as usual. The organization has underwritten many items that make life better at Matheny, such as ceiling lifts installed at the Matheny School, making transfers in and out of wheelchairs safer and easier; musical instruments; theater and sporting event tickets; iPads and other technology; and trips. The Friends also provides special food and gifts at holiday times and events, such as the annual Arts Access showcase, *Full Circle*, and Matheny's signature, annual event, Miles for Matheny. The Friends donates 100 percent of its earnings, to the tune of more than \$4 million since the group's inception.

The Friends also helps the Arts Access program purchase such items as frames to exhibit participants' work. "Exhibitions,



both on and off campus, can lead to the artists selling their work, which is very important to them," Halsey states.

Halsey, who continues to work with the Arts Access program as well, recently set up an installation of Arts Access works at one of the Affinity Federal Credit Union's New Jersey locations. "Someone saw a painting and became interested in purchasing it," she says. "I put the artist together with the interested person, who bought the artwork. It was a proud moment for the artist."

But The Friends are not the only ones turning up on a regular basis to volunteer their time. With staff support from Halsey and Matheny's Development team, Matheny also welcomes corporate and school groups, such as the one from the Willow School in Peapack, who came to the Matheny campus on Earth Day to clean up the nature trail. "These groups generally take on a campus improvement project that needs doing, such as painting a room, which they can complete in several hours," she says. "We'd like more

Left: Volunteer visitors Donna Allison and her dog, Fred, are great favorites at Matheny.

Below: Student Kendall enjoys a visit from Fred.

Right: Outreach and Events Manager Julia Halsey, shown at the Affinity Federal Credit Union's display of Matheny Arts Access artwork.

businesses to bring employees to Matheny for a day of volunteering. They do great work. And it's a powerful team-building opportunity for them."

She has several other goals in mind during the upcoming months. Encouraging students over the age of 14 to volunteer is high on her list. She is making personal visits to speak with area guidance counselors at high schools and tell them about Matheny and its open doors to volunteers. Students can come to campus as a group to accomplish a project that needs doing, or individually to spend time with residents.

"They can read to them, play games, or just chat and hang out," she says. "Their visits will always be appreciated."

The Outreach and Events Manager is in the process of streamlining the application process allowing volunteers on campus. "Keeping our residents and students safe is always the highest priority," she states. There are a few health and background check requirements, especially for those over the age of 18, she explains.



She also worked with the marketing staff to build a new web page to improve outreach efforts. It will list volunteer openings at Matheny and explain how to apply. "I think that just telling people about all of the volunteer activities here and simplifying the application process will have a big positive effect," she states.

There was a serious decline in volunteer visits during and following the pandemic, when all visitation was severely restricted due to infectious disease policies. But the doors are back open again, and Halsey is working hard to let people know that and to encourage the expansion of the volunteer program.

After a potential volunteer submits an application, Halsey does a phone interview to ascertain their areas of interest. "There are so many different opportunities here—in the hospital, the school, the group homes, the Arts Access program, and Life Enrichment Therapies," she explains.

A popular volunteer activity over the years has been working in the Second Chance Thrift Shop. "I'm working with The Friends to help them improve marketing efforts to attract new volunteers for the shop, and also get the word out to a wider audience about shopping there," she says. She's also revising the current onboarding policy so that volunteering

at Matheny will be easier and more streamlined.

Another focus will be to have more "community service days," which Halsey sees as a group working several hours on a project, followed by touring the facility and meeting residents—for a full day of engagement with Matheny." Her goal is to establish more long-term relationships between Matheny and outside entities. Making new connections, and sustaining those connections, with arts organizations and businesses continues to be a priority in her Arts Access work, and she aims to do that on a wider scale for the general volunteer community at Matheny.

"Some community groups that I've worked with at Arts Access didn't even know about Matheny," she says. (Arts Access participation is not limited to those at Matheny.) "I want to make sure more people become familiar, and connected, with Matheny in the future."

Halsey hopes that, over time, volunteer numbers will return to, and even surpass, pre-pandemic levels, and that all of these new relationships will be enduring and fulfilling as Matheny's doors open wide again. **MM**

If you are interested in volunteering at Matheny, email Julia at volunteers@matheny.org.



Oren Klein with daughter Rayne Klein, a Matheny School student and resident at Matheny.

A Call for In-Kind Donations

If you think you've heard of Oren Klein before, you're likely right. He was showcased on last issue's cover of *Matheny Matters* with his wife, Emily Kozlow Klein, a writer, and his two daughters, Rayne, a 15-year-old Matheny School student and campus resident, and Isla, a 12-year-old middle school student in North Caldwell. Earlier this year, Isla worked hard to inspire fellow students at her elementary school, raising more than \$4,000 on behalf of Matheny's Life Enrichment Therapy program, which her sister, Rayne, loves. (Rayne even went kayaking last Spring.) Isla plans to do it all again, this time at her middle school, and she hopes to top last year's donations.

But this time it's Oren's turn. Our last feature on the Klein family did not afford sufficient space to shine a light on his important contributions to Matheny, as well as the ideas that he hopes will spark similar actions by others.

No, Oren is not a healthcare professional or a Matheny School teacher or a Friends of Matheny member. He volunteers his time in a different way. Oren runs a firm that specializes in the sale of distressed real estate and businesses. He founded the firm, called AuctionAdvisors, in 2007. However, before outlining how Oren has connected this business with Matheny in a unique and mutually beneficial way, a quick reintroduction of the Klein family will provide some background.

Rayne Klein, who has required around-the-clock caregiving since birth due to her medical complexities, became a resident-student at Matheny in 2023. Although she had lived at home with her family for her entire life, by age 13, her care needs had escalated beyond what her parents could provide. Emily and Oren also felt that she would benefit from broader learning opportunities, more physical and

recreational activities, and the opportunity to make friends.

The Kleins researched the options and found Matheny, where Rayne is benefiting from the highly specialized, 24/7 medical care. She also loves school, as well as the social and recreational activities after school hours that keep her active and busy with other Matheny residents. “Matheny is the antidote to what I saw as the stigma of sending our child to live outside our home,” Oren states.

Emily says their older daughter has made great progress, and now “has a life filled with meaning and joy.” The family is on campus visiting Rayne frequently; they also take her home for visits, and to off-campus places that she enjoys.

In the last couple of years, the Klein family has become part of the larger Matheny community, attending Town Hall meetings and working on internal projects with other families. In addition,

Oren realized his company is strategically positioned to contribute to Matheny in a very concrete way.

First, a little personal background on Oren. He grew up in Union, NJ, graduated from Rutgers College in New Brunswick with a degree in sociology (or “a study of society, human behavior, and social interactions,” as he described), and moved to New York City, where he lived for 15 years and worked in real estate, until his marriage to Emily and return to New Jersey.

“In my current business, I run into situations where buildings are being razed, and companies are restructuring, downsizing, or closing down. This often involves cleanouts of their assets from spaces,” he explains.

“For instance,” Oren continues, “one of my clients bought a large office complex that they plan to convert to an assisted living facility for elderly people.

After the purchase of the building, they were left with a tremendous amount of office furniture that was in very good shape. I put them together with Matheny staff, who came with me and picked out things they are able to use.”

“Another time, I had a client who wanted to donate money to Matheny, but I knew Matheny needed an ice machine in the staff cafeteria. I got permission from my client to use the money for this item, and then called up a restaurant equipment dealer that I know who sourced the ice machine—a \$5,000 item,” he explains. “This was a great donation but the item was located in Staten Island. I reached out to another client, who owns a moving-and storage-company, who offered to pick it up and move it to Matheny at no cost. It took three connections, but it got done, and everyone felt good about helping out.”

Right now, Oren’s company is working with a New Jersey synagogue that is closing. “They may have school furniture and fixtures to donate that could be used by the Matheny School,” he says.

His idea is for Matheny to create a running list in a Google Doc, so that anyone in the Matheny community can keep an eye out for needed items. “Many people have connections they don’t realize can benefit Matheny,” he states.

“When I’m working, I always have Matheny in mind,” he says. “Could they use these things? Can I make a match between Matheny and my client?”

That “match” could prove very valuable to both, and is likely to positively impact Matheny’s students and residents in ways that the donor might never even have imagined.

“The need for in-kind donations has never been greater,” says Jim Campoli, Matheny’s Senior Director of Operations and Services. “We’re thankful for people like Oren because these donations are beneficial not only for financial reasons, but for environmental reasons as well.” **MM**

If you would like to contact Matheny about an in-kind donation, please email Matheny’s Development Office at development@matheny.org or call (908) 234-0011, extension 1260.



“The need for in-kind donations has never been greater. We’re thankful for people like Oren because these donations are beneficial not only for financial reasons, but for environmental reasons as well.”

JIM CAMPOLI • MATHENY’S SENIOR DIRECTOR OF OPERATIONS AND SERVICES



A Lifelong Mission To Give Back

The critical work of a well-functioning Board of Trustees can be easy to overlook. Entrusted with helping to steer the current and future direction of an organization, the Matheny Board is composed of volunteers who give their time and expertise without financial compensation. The collaborative work of its members certainly impacts the current health of the institution and will shape its well-being for many years to come.

So why do individuals, whose resumes undoubtedly stand out in the crowd and whose professional lives are generally crammed with activity, “serve” on such Boards for years? There are certainly many reasons, but high on the list are a strong desire to “give back” and a passion for the organization’s mission.

That’s precisely the case for Carl Kirton, a very welcome addition to Matheny’s Board of Trustees, who currently serves as its Vice Chair. A quick look at his extensive resume will assure you that his background closely matches Matheny’s needs; and a quick conversation with this dynamic Trustee will tell you that his commitment to Matheny’s mission now and in the future will not be taken lightly. Even without the driving force of financial remuneration for their many hours “on-the-job,” Board members can be counted on for their care and dedication in carrying out their responsibilities.

Just looking at Kirton’s long list of degrees, positions, and other achievements might cause you to stop in your tracks,

gasp, and respectfully inquire: How did you do all this? Do you really want to take on another big responsibility?”

Rest assured that whatever Kirton takes on, he does with great determination; and he brings an amazing breadth of experience in healthcare and education to this team.

He started out many years ago in the Bronx, and headed off to college intent on becoming an elementary school teacher. However, a part-time job in a doctor’s office during his early college years changed all that.

“This doctor was ahead of the curve in the late ’70s,” he explains. “He had a nurse practitioner in his practice, which was unusual at that time. I was so impressed with the work she was doing.”

Facing page: Carl Kirton (fifth from left) enjoyed the day with Matheny staff and families at this year's Miles for Matheny.

Although he was already several years into his undergraduate degree in education, and nursing had never been on his “radar,” Kirton decided to make a sharp pivot and completely change direction. “It was like starting over again,” he remembers. Once his new course of studies was decided, he determinedly set forth on his goal of becoming a critical care nurse, earning a bachelor’s degree from Lehman College, and starting his career at New York University (NYU) Tisch Hospital Medical Center’s Critical Care Unit.

“I loved it,” he says, “but wanting to be a teacher was still in my blood.” So, he completed a Master’s in Education next, while working full time as a manager of a critical care unit, and also started to do some teaching at NYU.

In the late ’80s, he successfully applied for a teaching position at NYU’s Rory Meyers College of Nursing, and almost simultaneously enrolled in the school’s nurse practitioner program. “It was the time of the HIV/AIDS epidemic, and I worked on St Vincent’s AIDS Unit for clinical experience,” he states. “It changed the trajectory of my career.”

Seeing the huge need for nurse practitioners dedicated to hands-on HIV/AIDS care, he made a switch from critical care nursing to AIDS nursing. While on faculty at NYU, he worked primarily at Mount Sinai Hospital as an HIV/AIDS nurse practitioner.

By the ’90s, Kirton moved on to managerial and administrative positions, continued to teach, worked as a nurse practitioner, and never stopped going to school.

He next took on the position of Director of Nursing at Mount Sinai, then left there to become a senior vice president and Chief Nursing Officer of North General Hospital in East Harlem (it closed in 2010), where he “moved up the ladder and developed another passion—for working in safety net hospitals. I love their mission—to help low income and minority populations.”

His next move was to Lincoln Hospital, a public hospital located in the South

Bronx “with a great mission,” where he served as its Chief Nursing Officer for six years, before being recruited to University Hospital (UH) in Newark. Through the years, he has continued teaching, as well as learning, and working towards additional degrees.

He was Chief Nursing Officer at UH during the COVID-19 crisis years; and it was “one of the hardest things I ever had to do. I was there every single day; I didn’t take any time off. It took a lot out of me.”

His kindness to patients and families, his total dedication to

“There’s nothing else like Matheny. It’s unique in what it offers. Matheny provides a special kind of caregiving. I’m moved by the commitment of the caregivers and the specialness of their work.”

CARL KIRTON • VICE CHAIR, MATHENY BOARD OF TRUSTEES

their well-being and survival, and his genuine concern and caring for every patient he encountered became legendary among the staff and clients. He stayed at University Hospital for six years, then made a big decision—to step away from clinical care, which had been so central to his life’s work, but had finally exhausted him.

Throughout his long career in nursing and education, Kirton also has been active in writing and editing. He has served as associate editor for several journals, has written and published a couple of books on HIV/AIDS care, and has generally been a force in the publishing world. He is currently the editor in chief of the *American*

Journal of Nursing, a job that he “loves,” even as he witnesses, somewhat sadly, “the publishing world changing.”

Kirton has never stopped studying (he loves learning new things) and earning graduate degrees. He has two Master’s degrees—one in nursing education from NYU in 1992 and an MBA from St. Peter’s University—and earned two doctoral degrees—one in nursing practice from Case Western University and his most recent a Doctor of Philosophy degree from Seton Hall University. He has



also continued teaching throughout his career, and still finds it rewarding. His full-time editor’s job does not preclude his teaching four different courses (among them statistics, finance, and policy-making) at four different universities every semester, despite his other rigorous job responsibilities.

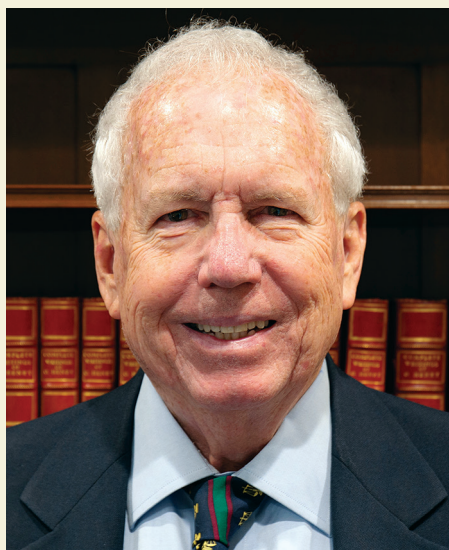
But busyness and the changes taking place around him don’t stop Kirton in his tracks. If anything, they are an impetus to look forward and plan his next steps. Matheny is definitely part of those plans.

Kirton was named to the Matheny Board in 2023 after “a lot of vetting,” he says. Although he’s one of the Board’s

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Meet Bill Engel

One of NJ's Foremost Philanthropy Experts



Most of us have had little reason in our lifetimes to learn the intricacies of setting up and managing a foundation or special philanthropic fund. The complexities can seem overwhelming, the funds needed for set-up and continuity higher than many count on. However, there are experts in this field who can advise, and help manage the entire process for those who want to make it happen.

For a better understanding of these intricacies, we introduce our readers to Bill Engel, a long-time New Jersey lawyer with considerable experience in estate planning and management, as well as notable expertise in launching and managing foundations. He has served on, and chaired, the Boards of Trustees for many foundations and other nonprofits, both large and small; and has kindly agreed to provide *Matheny Matters* readers with some insights into the world of philanthropy.

Engel grew up in Westfield, NJ, from the age of 4, attended the public schools

through eighth grade, and graduated high school from The Pingry School. He served as a Pingry Board of Trustees member for 23 years, seven of those years as the Chair.

After earning an undergraduate degree in history, with a special focus on African American history, from Princeton University, he completed a law degree at the University of Virginia School of Law. His strong interest in politics and government led him to Capitol Hill for a summer internship with his congresswoman during college and two years of working for a member of the Virginia General Assembly during law school.

Without a job or solid plans post-graduation, he returned to his native state to take the bar exam, then went back to Washington, DC, where he worked for a congressman for one year, then had an opportunity to work on the political campaign for the Attorney General of Virginia. He was also considering a return to New Jersey to enter his father's law practice.

"I agonized about the decision," he says. In 1976, he came back to New Jersey to work in the office that his father, Joseph Engel, had founded in 1945. "And here I am 49 years later," he says (not unhappily).

Father and son practiced together for 11 years, until "my father developed Alzheimer's. He was just 69 years old," Bill Engel says. After his father's retirement, he practiced alone for 12 years.

Over the years, he has become more and more involved in the world of philanthropy, while passing on the "bread and butter" of the law practice to his two partners. One of them, Sean Devlin, started in the practice part-time while studying accountancy as an undergraduate. Engel encouraged him to become a lawyer, and mentored him throughout his law school



years. Devlin passed the Bar in 1998, and became Engel's law partner in 1999.

That partnership, along with the more recent hiring of partner Melissa Sgambati, allowed Engel to venture further into managing foundations, and to continue serving as a trustee for several foundations and other nonprofits. The firm is now known as Engel Devlin Sgambati, LLC.

Since his start in the philanthropy world in 1976, Engel has "come to know hundreds of foundations. I've been a foundation trustee for a total of 242 years, and a volunteer trustee of numerous non-profits for 101 years," he comments. "It has been a major focus of my life."

"There are so many good people and so many good things happening. I believe in these causes and I want to contribute to their success," he explains. "I see how much good they do, and I get so much back."

With his extensive knowledge about how to get a foundation up and running, and keep it running long-term; the ins and outs of day-to-day management of the finances and taxes; how to work with diverse individuals serving on the Boards of these foundations and other nonprofits; and his understanding about the operations of various nonprofit grantseekers, he is a recognized leader in New Jersey's philanthropic world.

"In 1976, when I started doing this work, operations were fairly casual, with no set guidelines," he explains. "But that has all changed."

His particular focus has been smaller, private foundations based in New Jersey that award grants to organizations operating in specific New Jersey counties or serving people from those counties. "Many of these types of foundations are started by couples and families with no

children who might be the normal focus of their financial planning," he explains.

Over the years, Engel has earned recognition as something of a guru. He's the former Board Chair of The Hyde and Watson Foundation, and served as a Board member and Chair of the Council of New Jersey Grantmakers, a primary resource for the State's philanthropic community. He also was one of the

A FEW UPCOMING TAX CHANGES TO **Charitable Giving**

On July 4, 2025, President Trump signed into law a major tax reform package called the "One Big Beautiful Bill Act." As a taxpayer, it's important to understand how these changes may impact your charitable giving in 2025 and the future.

You should discuss these changes with your accountant or attorney since many of them involve the deductibility of charitable contributions and have income tax implications for individuals.

founding Trustees of New Jersey SEEDS (now called SEEDS: Access Changes Everything), a nonprofit focused on preparing high-achieving, low-income students for admission to private schools and colleges nationwide, and served on that Board for many years. He currently serves as a Trustee and Co-Executive Director of the E.J. Grassmann Trust and as President of the Union Foundation and the Standish Foundation; and frequently participates in nonprofit conferences and seminars as a speaker or panel member.

His introduction to Matheny came in the 1980s, when Matheny became a grantee of the EJ Grassmann Trust. Engel was serving as a trustee. In the early 1990s, he became even more familiar with Matheny, as a trustee of the Union Foundation, and Hyde and Watson. Matheny's mission calls to him.

He explains that the foundations that he helps manage are all somewhat unusual in that they give "capital grants" and have tight geographical boundaries. The grants provide one-time funds for an organization to purchase needed equipment, such as computers, or to build or renovate parts of their facility. Grantees may apply annually or every second year, depending on the foundation's policies.

What is the process? Simply put, a nonprofit, such as Matheny, applies for a grant to purchase a specific item or for funds to carry out a change to their physical structure. "These foundations tend to give a lot of smaller grants, which average about \$15,000, to small- to medium-sized nonprofits," he explains. "But the grants can generally make a big difference to a smaller place. For instance, a \$10,000 grant to a small nonprofit for a new phone system can be life-changing."

Each of the five Foundation Boards he is currently involved with has five to 11 trustees, he says. "I have one vote when Board decisions are made. Each of these foundations has a mix of people with varying expertise. There is a lot of discourse and lots of strong opinions are voiced."

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Bill Engel

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Who does he think makes a good board member for a foundation? “You must play well with others, be respectful but don’t always agree, and have both common and diverse interests from others on the Board. Having worked for a nonprofit, or sat on the Board of a nonprofit, is definitely a plus,” Engel states, “and institutional knowledge is important. Strict conflict-of-interest policies govern when a Foundation Board member can cast a vote, but would not preclude that individual from having a formal connection with a grantee, without voting on a grantee’s proposal.”

If sitting on a Foundation Board is something you have always wanted to do, what would Engel advise?

“That’s a question I’m often asked,” he states. “There’s no magic bullet, but first and foremost learn about the Foundation and nonprofit world.” He recommends starting on the Internet by familiarizing yourself with the websites of the Council of New Jersey Grantmakers and the New Jersey Center for Nonprofits.

“If you’re a volunteer for a nonprofit,

find out about educational programs and conferences you could attend,” Engel continues. “Also, many communities have foundations—look at foundations in the community where you live. Other foundations operate Statewide. Access a list of foundations in New Jersey, and see if your interests match their missions.”

“If you know people on Foundation Boards, connect with them and ask questions. Get involved in a philanthropy you already know about,” he says. “Most Board members have a connection with the Foundation they serve. If you have no connection, see if they need volunteers.”

And if you’re thinking of starting a Foundation? First learn everything you can about Foundations, he advises. One good resource is The Council on Foundations (cof.org).

Engel says there are several different types of foundations. “Private foundations are generally financially supported by one or a small number of sources—an individual, a family, or a corporation. Family foundations often focus on charities that the family has supported,” he says. “Generally speaking, since overhead for small family foundations is somewhat high, it generally takes \$1–\$2 million to get things going.”

Aimee Hunnewell, Chief Development Officer; Bernie Moriarty, President of the Hyde and Watson Foundation; and Bill Engel



Are there options? “There’s been a trend toward donor-advised funds, where the overhead is taken care of,” he says. “Another trend is founding a ‘sunset foundation,’ which operates for a limited amount of time.”

If you’re thinking of starting a foundation, having access to an expert in this field is worth a lot. While all of this sounds complicated, Engel says that good advice can start you moving in the right direction.

“Learn as much as you can. Ask questions,” he says. And to the Matheny community, he makes a very generous offer: “Pick up the phone. You can always call me to talk.” **MM**

Carl Kirton

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newest members, he’s certainly not new to its mission. He comes with a lifetime of knowledge and experience in both the healthcare and education sectors.

“I am very familiar with Matheny. There’s nothing else like it,” he says. “It’s unique in what it offers.”

“Matheny provides a special kind of caregiving. I’m moved by the commitment of the caregivers and the specialness of their work,” he states.

Working with the Matheny Board will provide Kirton with what he calls a “very different opportunity to give back in a special way.”

Although he has not worked with individuals affected by medically complex

developmental disabilities before, his sister has been a special needs educator in the public schools throughout her career, working with severely autistic children. “I’ve always been in awe of her and what she does,” he says.

In an environment where healthcare reimbursement is changing, “This population will need more help and support. I bring experience in hospital operations, healthcare finance, and healthcare leadership; and as a nurse, I understand what’s necessary in order to give quality nursing and caregiving.”

“We need to advocate for Matheny. With an aging facility, we have to make sure that we think about the future of the patients. We need to be aware and responsive to change.”

“The Board is a talented group of individuals, and like any team, the executive

will build a team that can make the best decisions by capitalizing on the talents of its individual members,” he says.

As a Board member, Kirton will be a volunteer, something else he has done throughout his life. His commitment throughout has been to recruit, educate, and support quality healthcare personnel, particularly nurses, who work in communities where they are needed most; to serve as an advisor on the future of healthcare and innovation in nursing; and to help populations in need of critical care, particularly during healthcare crises, such as the HIV/AIDS and COVID-19 pandemics.

Matheny extends a warm welcome to Carl Kirton, whose enthusiasm for his new role at Matheny, and his knowledge and commitment, will certainly benefit the organization as it prepares for its future. **MM**

Miles Back by Popular Demand

On Matheny's beautiful hilltop campus in Peapack, on Saturday, June 7th, the 28th Miles for Matheny kicked into high gear. Students, residents, friends, family, lots of kids, staff, and community and corporate supporters gathered for a day of fun, live music, and good food. The Lu Huggins Wheelchair Walk, the Kids Fun Run, the Trail Run/Walk, and the Revolutionary Ramble for Matheny cyclists are all great favorites every year, and this year was no exception. Miles 2025 raised just over \$250,000—the largest amount in recent years. Matheny gives a big thank you to everyone involved, and a special shout-out to the event's generous sponsors.



PHOTOS: TIZAZU ALAMRU

The Honor Roll of Donors

Individuals, corporations, organizations, and foundations generously helped support every aspect of life at Matheny during Fiscal Year 2025.

Because of our donors' compassion and support of Matheny's mission, the lives of hundreds of students, patients, residents, as well as their families and friends have been enriched in so many ways. We thank all contributors for their extraordinary generosity.

This donor list includes gifts received between July 1, 2024 and June 30, 2025.

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Bringing brightness—to our residents, homes, staff, families, community members—is the **Daiichi Sankyo** way. Our cherished corporate partner colleagues contribute to Matheny's progress in so many ways, such as just recently: supporting residential kitchen renovations, team-building outdoor furnishings, holiday giving in honor of employees, funding special events and projects, and, here, sprucing up our Basking Ridge residence entryway with donated plantings. Led by Rose Ann Hastings, Associate Director, Corporate Communications, pictured here with her teammate, Marguerite Zietkiewicz, along with Matheny staff, this initiative is just one example of a literally beautiful friendship between our organizations.



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Community collaborations are core to Arts Access's impact, and our **Mayo Performing Arts Center** exhibits are no exception. Shown with our artists and staff during the opening reception are Mimi Washington Starrett Foundation's JoAnn Tiefau and Investor Foundation's Priti Mehta.

Top (l-r): Trish Stush, Matheny Development Specialist; Brad, Arts Access artist; JoAnn Tiefau. **Bottom (l-r):** Heather Williams, Director of Matheny's Arts Access Program; Mike, Arts Access artist; Priti Mehta; Isabel, Arts Access artist.



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Ann Manwaring
Douglas Manwaring
Ellen Manwaring
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Darlene Marks
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Kevin Francisco
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Molly Gahagan
Michael Garcia
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Erica Gendel
Alex Gitkin
Carol Goldman
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Robin Graves
Robert Gullickson
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Kimberly Hegarty
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Karen Herman
Tiffany A. Hill
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Helga Horn
Myrl Jean Hughes
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David Karner
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Ilona S. LaChina
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Doug Dale
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Rahil Darbar
Mario De Armas
Amanda DeMouthe
Samantha DePalma
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The Evangelista Family
Susan Falcone
Patti Feeney
Gary Fellner
Geraldine Fernand
John G. Fesken
William Finke
Lois Fisher
Frank and Kathy Fister
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Barbara and Douglas Ford
Christopher Fornal
Ashley Foukas
Jackie Fraller
Kevin Francisco
Meghan Francisco
Laddie Fromelius
Molly Gahagan
Michael Garcia
Charlotte Gelfand
Erica Gendel
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Carol Goldman
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Helga Horn
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Ruby, Harris, and Hudson Hwang
Rachel and Brian Jacobs
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Eleanor Jardim
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Arthur and Kathryn Lunga
Amanda Luzniak
Emilia MacLeod
Beverly A. Maddalone
Sabrina Malfa
The Malfa Family
Michelle and Anthony Mando
Gail Mangat

What a day—when the Eastern Region team from **Hyundai Motor Company's** luxury vehicle division, Genesis, volunteered on a Friday in September at Matheny's Peapack campus. Members dedicated their time and energy to helping with campus improvements, such as priming handrails, which needed attention all over our campus. There's no doubt that the crew's hard work on behalf of Matheny made a big difference. We look forward to your return sometime in the future.



Monthly **Welcome Wednesdays** during the past year provided tours of Matheny's Peapack campus and opportunities to engage further with our mission. A cross-section of supporters—from family and foundation representatives to students and stakeholders—came out in full force in August, underscoring that there's no such thing as a slow season for Matheny's vital work. Special thanks to our friends at the Community Foundation of New Jersey and Somerset Hills Community Health Foundation for taking extra time to visit with our team and explore partnership priorities.

Matheny staff pose for the camera with visitors on a recent Welcome Wednesdays tour.



The **Morris Area Freewheelers (MAFW) Bicycle Club** welcomed Miles for Matheny cyclists to join their 16th Annual Revolutionary Ramble fundraiser, a premier New Jersey cycling event held in June. Cyclists riding in the Ramble for Team Matheny raised funds to benefit students and residents. Michael Chenkin (r), President of the Freewheelers, presented a check of these proceeds to Matheny VP Sean Bielefeldt (l) and Chief Development Officer Aimee Hunnewell, who said, "We were thrilled to renew our partnership with the Morris Area Freewheelers." This was the second time that the Freewheelers and "Miles" joined forces to fundraise.

Karin Manwaring
Michael Manwaring
Michelle Mardis
Christine J. Mayercik
Robert Mayercik
Elaine McVey
Carole Mecca
Yahaira Mendez
Roxanne Middlebrook
Kathleen Miklosey
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'Some additional donors requested to remain anonymous. We sincerely thank them for their generosity.'

As we've gratefully highlighted a special cross-section of Matheny givers, we appreciate each and every person and partner who donates vital resources in support of Matheny's programs and progress. Space limits our ability to profile here all cherished contributors; Matheny's dynamic social media feeds and other platforms offer additional opportunities to showcase the many creative ways our community members can help Matheny through time, talent and treasure.

Follow us on social media @**mathenymedical** on Instagram, FaceBook, LinkedIn and YouTube

A Visit to Matheny Leads to a Generous New Bequest

On the day Chris Kosseff visited Matheny's Adult Day Center in Hillsborough to present a program of his wildlife photography, he fell in love. And if the rapt attention of his audience was any indication, they did, too.

Leopards, gorillas, jaguars, and more, making their homes in remote areas around the globe, seemed to leap from the screen. Day Center clients were mesmerized.

Photographing wildlife in their native habitats has been a passion of Kosseff's for decades, but it has never been his paying job. In fact, his long career took him into successively more responsible and demanding positions in the mental health field. Photography was a hobby, an important one to him. But it wasn't until his 2016 retirement that he could devote months out of each year to traveling with his wife and his cameras to the many remote places on his long list.

Kosseff, who grew up in Ossining, New York, earned an undergraduate degree in anthropology and a Master's degree in counseling from Syracuse University, and worked for four years in Watertown, NY, at Mercy Hospital's Community Mental Health Center. While there, he learned a couple of things that changed his life's course. "It was just too cold up there for me," he says, "and I had more of a propensity to do management than counseling."

He hit his stride when he moved on, restarting his career at the University of Medicine and Dentistry of New Jersey, where despite, or maybe because of, his continuing interest in mental health, he became a "young manager" and then a program administrator at the University's behavioral health center. But that was just the beginning.

Over his 36 years there, he became widely respected for his leadership roles in several behavioral health programs, culminating in his becoming President and CEO of University Behavioral Healthcare

at UMDNJ and then Rutgers, when the two entities merged. In that role, he headed up the largest behavioral health-care system in New Jersey until his retirement in 2016. In addition, he held academic titles, including Clinical Assistant Professor of Psychiatry at Robert Wood Johnson Medical School and New Jersey Medical School.

High on the list of his many career accomplishments is the establishment of the State's Suicide Prevention Helpline in 2005, which is still going strong. The State's Prison Health System also came under his jurisdiction in 2008, a new major responsibility that he continued until his retirement.

Looking back at his long career, Kosseff says simply, "I enjoyed myself. But then it was time to move on."

His active work life did not preclude his interest in travel, and nature photography, as well as learning about investing. Retirement just afforded him more time and energy to devote to these interests.

It is these pursuits that have moved front and center in his life, and also afford him a great deal of enjoyment and satisfaction. His most recent travels have taken him to Antarctica, Greenland, and Iceland, and he and his wife will go scuba diving in Bonaire this winter. In the photography realm, he has trained with renowned nature photographer Frans Lanting and Peter Hurley, who is widely recognized for his portrait photography.

"I don't sell my photographs," says Kosseff, who offers free downloads of his work from his website (www.chriskoosseff.com). "I do it for fun and for the appreciation of the world around us."

But his interest in investing has a decidedly different purpose. "I've always been an active investor, going back 40 to 50 years," he explains. "The difference is that now I have more to invest than when I started out, thank goodness."

His objective is to provide financial help to places and causes where he can



Chris Kosseff (l) with resident Josh Handler and Aimee Hunnewell at the Adult Day Center in Hillsborough

make a difference. "My wife, Betty, and I have been fortunate," he says. "We worked hard and earned good salaries." And they were able to make that money grow.

Over the last few years, he and his wife have researched and discussed the best ways they can contribute to causes they feel strongly about, and still be financially prepared should one or both of them need long-term care in the future. "There are so many unknowns that you can't plan for," he says. "We want to do good, but we need to have the contingencies covered."

They were looking for a solution that would not be overly complex, but would be effective. We considered marital trusts, donor advised funds, and our own foundation. After discussing this with lawyers, brokers, and other philanthropically minded individuals, Kosseff says he came upon a simple solution, and one that seems to cover their needs and concerns.

"The answer for us," he says, "is an underutilized way of giving. It's a bequest simply using beneficiaries on accounts. There are many people in the same situation as we're in—comfortable, and wanting to give money to causes and still have enough for our future needs."

"Using beneficiaries for IRAs, 401ks, or after-tax accounts, you can plan to give money away in the future. And you modify the beneficiaries and the amounts with a simple, on-line process. No lawyer or change to a will is necessary. If you

had to go into a nursing home and stay for five years, you would be running that money down,” he states. “But you can still give what’s left, divided among your named organizations.” In the meantime, the couple gives charitable donations to Matheny and others.

The Kosseffs have added Matheny to their list of nonprofits that will receive a stated percentage of their assets. The list includes organizations focused on preservation of agricultural land and forests, such as Shelburne Farms in Vermont, which is also a nonprofit sustainability learning center, and another nonprofit that focuses on youth suicide prevention. The recipients of their funds are clearly hand-picked.

“Including Matheny in our list of bequests took only 30 seconds online,” he says. “It was that easy.”

“Helping people with our money is a major priority in our lives,” he continues. “We like that Matheny is relatively small, that our donations won’t get lost in the midst of huge donations given by others to large organizations. And we think Matheny is impressive. The staff is incredible.”

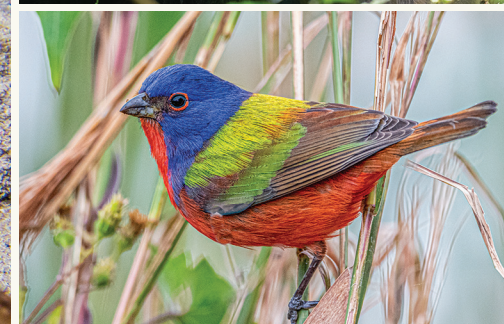
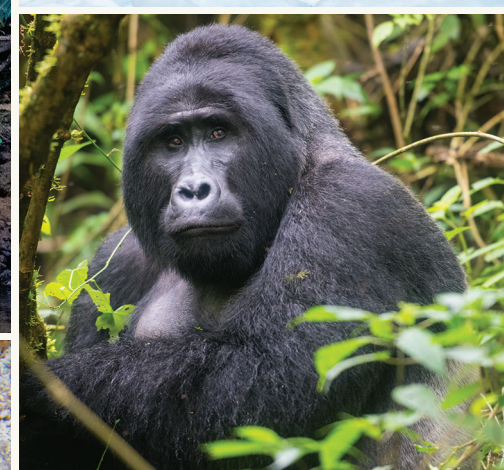
“It’s exactly the kind of organization we really like,” he says. “They care for people who need care.”

“I’ve worked in health care and human services my entire life. My wife is an advanced practice nurse. This is what we care about now,” he says. “And it’s nice to think that after we die, something will carry on to help people and causes that matter to us.”

For Matheny’s volunteers and staff, Kosseff’s strong feelings about Matheny are no great surprise. Many have stayed involved there for decades, because they reacted to Matheny in the same way.

And that is the story of how a short visit to entertain residents at Matheny turned into a lifelong-and-beyond-engagement with the organization. Simply put, it’s called a bequest. **MM**

To make a bequest to Matheny, contact Aimee Hunnewell, Chief Development Officer, at 908-234-0011, extension 1275, or email the Development Office at development@matheny.org.





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