

Aging with Dignity

2022 Annual Report

Celebrating 25 Years of FIVE WISHES®



Chairman's Letter

January 2023

Dear Friends:

I have been on the Board of Directors of Aging with Dignity from its beginning in 1996 and am honored to be its chairman. The men and women who serve with me are some of the finest people I know and are committed to our mission to safeguard and promote the right to age with dignity.



This report gives you a glimpse into the activities of this past year. We were particularly thrilled by the long-awaited publication of the book on Mother Teresa of Calcutta by our founder, Jim Towey, which coincided with the 25th anniversary of her death. As he describes beautifully in his highly-acclaimed work, her last 12 years demonstrate that aging is a blessing and not a curse. We believe this saintly woman has much to teach the world in the 21st century about the sanctity of life and inviolable beauty of human dignity. We are proud that our organization actively promotes her legacy.

This year we will celebrate another silver anniversary — the commemoration of the 1998 national release of *Five Wishes*, our advance directive that has changed the way Americans talk about end-of-life care. None of us on the board could have foreseen then how tens of thousands of organizations would ultimately distribute it throughout the United States or envision the tens of millions of Americans who would embrace and use it.

Aging with Dignity is now positioned to be a vital resource to, and a faithful voice for, the elderly, disabled and mentally ill as they seek to maintain their right to receive the care and respect they deserve. These vulnerable Americans have a great deal at stake in the national debate over the legalization of assisted suicide that is legal in many states and is under consideration in many more. America can do better than that.

I hope you enjoy this glimpse into the fine work of the dedicated staff in our Tallahassee, Florida, and Washington, D.C. offices. They could not do it without the support of our nearly 1,500 donors and the millions of *Five Wishes* customers.

Greater things are ahead in 2023!

Sincerely,

Guy Smith

Guy Smith
Chairman

Aging with Dignity

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MISSION AND VISION

For more than 25 years, Aging with Dignity has defended the God-given right of the elderly, disabled, mentally ill and vulnerable to have their human dignity respected and safeguarded, particularly in times of serious illness.

Aging with Dignity was founded in 1996 by Jim Towey when he served as legal counsel to Mother Teresa of Calcutta. During her lifetime, she wrote in support of Aging with Dignity and urged him to “defend and protect life, the most beautiful gift of God, and to bring God’s love and compassion to the elderly poor.” She believed “there are among us so many who are poor and elderly, in need of our understanding, respect, love and compassion, especially if they are sick, handicapped, helpless or alone.”

From its inception Towey wanted Aging with Dignity to be the voice of the “little ones” whom Mother Teresa embraced, especially those facing death. The *Five Wishes* advance directive he created to assist the dying and their families has since become America’s most popular tool to plan for end-of-life care.

The urgency and importance of Aging with Dignity’s mission have never been greater:



Jim Towey speaks to University of Notre Dame students.

- More than 46 million adults 65 and older currently live in the United States.
- Nearly 5 million of them live in poverty, including 11% of citizens 80 and older.
- The COVID-19 crisis highlighted how quickly the elderly poor can be isolated, forgotten and consigned to lives of loneliness.
- The 21st-century push to utilize artificial intelligence further risks dehumanizing care for the aged, disabled and dying.
- The demands on “sandwiched” caregivers — those who care for aging family members while caring for their own children — grow each year as the large cohort of Baby Boomers age.

"I had no idea the broad expanse of good works you are doing ... I want to say, 'Thank you for being the impetus for love to reach the ones who can be so invisible and who deserve respect, attention and care and to have their dignity preserved ... God bless you and your organization.'"

— Carol Novachis, Minneapolis, Minnesota

ADVOCACY: A VOICE FOR THE VOICELESS

In addition to being the nation's go-to expert on advance care planning, Aging with Dignity has become an effective advocate for the rights and dignity of all people as they age. Its membership of more than 150,000 Americans and ability to attract media attention help guide public policy and shape attitudes. Aging with Dignity's influence in the public square has been and continues to be formidable.

- Towey, in a *Wall Street Journal* opinion piece, was among the first to point out the dangers of the metaverse being developed by Mark Zuckerberg, Facebook's founder. Towey said the elderly poor, disabled or dying wouldn't have a place in a "make-believe playhouse" ruled by the meta-billionaire.
- As Covid pandemic lockdowns began, Towey penned an important opinion piece in *The Washington Post* that decried the well-intended but adverse effects of the social isolation of the elderly and the heartbreak of their families forcibly separated from them. His concerns were prescient.
- In October Towey's support for improved end-of-life care and fervent opposition to the spread of physician-assisted suicide were featured in the *National Review*. Towey detailed the dangerous, slippery slope that Canada has embarked upon in expanding the right to assisted suicide to the mentally ill and minors.

NATIONAL REVIEW

NR PLUS WORLD

MAID in Canada: The Right to Die

By JIM TOWEY

October 22, 2022 6:30 AM

America's northern neighbor has embraced a culture of death.



Kathryn Clarke



Margaret McGahon

Inspirational videos

Throughout 2022 Aging with Dignity offered a popular video counseling series featuring Kathryn Clarke and Margaret McGahon. In short 2-10 minute segments, the two separately explore such topics as spirituality, grieving, coping with caregiving challenges, personal development and other important topics of interest. These popular videos are posted on the Aging with Dignity website and are promoted in its weekly newsletter.

Social media

More than 1 million people were reached through Aging with Dignity's and *Five Wishes*' Facebook, LinkedIn and Instagram posts. More than 200,000 people also visited the Aging

with Dignity and *Five Wishes* websites in 2022. Towey's biweekly blog articulates Aging with Dignity's position on the important issues of the day.

New Washington, D.C., area office

Aging with Dignity opened an office in the Washington, D.C., metropolitan area to be closer to key policymakers and national media centers. The new office is the organization's hub for advocacy and outreach efforts and enables greater involvement in the work of the nearby Mother Teresa Institute.

Independent and trustworthy

Because of the generosity of its members and benefactors, Aging with Dignity has successfully maintained its independence throughout its 25-year history. Accepting no taxpayer funds, Aging with Dignity is a truly independent voice for the elderly and their families and continues to shape public policy and influence American culture by affirming God-given human dignity.

"I enjoy reading your weekly newsletter and the many stories on Aging with Dignity. They are informative, enriching and enlightening. Keep up the great work!" — Tab Battle, South Chesterfield, Virginia

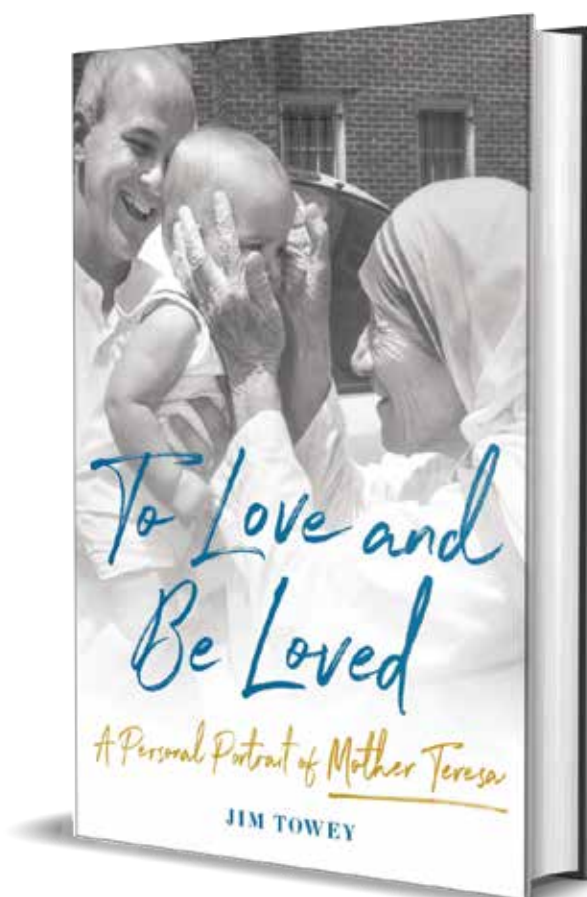


HONORING THE LEGACY OF MOTHER TERESA

Promoting awareness of Mother Teresa of Calcutta's life's work is a central part of Aging with Dignity's mission. A highlight of 2022 was the release by Simon & Schuster of Towey's book, *To Love and Be Loved: A Personal Portrait of Mother Teresa*. The book, published on the 25th anniversary of her death, provides an account of her last years and how she aged with dignity. Towey was Mother Teresa's legal counsel and friend during the last 12 years of her life. His moving, firsthand account of her luminous humanity has attracted national and international acclaim.

Towey personally presented a copy of the book to Pope Francis at the Vatican the same week the book was released. Media interest has been extensive, with the book commanding the attention of *The New York Times* Book Review, Fox News network, Vatican News, *L'Osservatore Romano*, EWTN, CNS, *National Catholic Register*, *America* magazine and other major outlets.

Towey's book tour has included speaking engagements at the American Enterprise Institute in Washington, D.C.; University of Notre Dame; the George W. Bush Presidential Center in Dallas, Texas; a Baton Rouge, Louisiana, community leaders gathering; and the



Knights of Malta in Syracuse, New York, among others. This tour will continue in 2023 with keynotes at universities, churches and book fairs planned for several states.



Towey continues to provide pro bono legal assistance to the Missionaries of Charity and its 46 missions in the United States as well as its headquarters in Calcutta. In September *The Wall Street Journal* published

Towey's opinion piece, "Mother Teresa and the 'Sisters Who Stay,'" which highlighted her religious order's loving presence among the poor of the world.

Towey traveled in November 2022 to Nairobi, Kenya, for a week of talks on Mother Teresa to 100 of her Missionaries of Charity sisters. This trip led to a series of blog posts by Towey on the triumph of human dignity even in the midst of the worst slums of the world.



Jim Towey and Dr. Christopher Scalia talk at an American Enterprise Institute Forum.



AEI President Robert Doar, Chairman Dan D'Aniello and Mary Towey share a laugh.





Father Brian Kolodiejchuk, Supreme Knight of the Knights of Columbus Patrick Kelly, Sandy McMurtrie, Cardinal Wilton Gregory, and the Rev. Monsignor Walter Rossi attend the dedication of the Mother Teresa Institute in Washington, D.C.

This past year Aging with Dignity expanded the reach of the Mother Teresa Center (MTC), San Diego, California, by providing a \$50,000 grant to establish a new project of the MTC in Washington, D.C., — the Mother Teresa Institute. The Institute’s goal is to facilitate scholarship, academic

study and a broader public awareness of Mother Teresa’s teachings on human dignity and the divine imprint on all people. Aging with Dignity continuously connects its mission and services to Mother Teresa’s inspiration and legacy.

WHAT WE BELIEVE

- Every person has the right to age with dignity.
- This right is conferred by God, not government, and exists regardless of one’s health, wealth, race or creed.
- The primary need of every human is to love and be loved, and this is most acutely true in times of increased dependence on others.
- People are gifts from God, not burdens to society. They are no less valuable when they are sick and are not defined by their diagnosis and incapacitation.
- Dying is not simply a medical moment but a deeply personal, spiritual and emotional time.
- Patients have the right to decide the kind of medical treatment they want or don’t want when they are gravely ill.
- Assisted-suicide and euthanasia are not compassionate choices for those suffering; better pain management, accompaniment and humane treatment are.
- Improving end-of-life care and decision-making is urgently needed, particularly for the elderly poor, disabled and mentally ill who cannot afford their illnesses.
- Those who suffer and are near death deserve the warmth of human accompaniment.
- Advances in “tech medicine” and artificial intelligence can help as long as people are its masters and robots do not replace human beings in the provision of health and long-term care.



SILVER ANNIVERSARY OF *FIVE WISHES*

When Towey and Eunice Kennedy Shriver unveiled *Five Wishes* at a November 1998 press conference at the National Press Club in Washington, D.C., no one foresaw that physicians would one day be able to bill for advance care planning conversations with their patients and individual care plans would be stored and retrieved through a patient's electronic medical records. Such changes compelled Aging with Dignity to develop a comprehensive program for medical providers to discuss and document end-of-life conversations with patients and for employers to offer a *Five Wishes* benefit to their employees.

Twenty-five years later, the results speak for themselves. More than **50,000 partner organizations** have distributed over **41 million copies** of *Five Wishes*. It is now available in **30 languages** (plus Braille) and **meets the legal requirements of all 50 states**. It also is used in Italy, Colombia, China, Japan, Norway, the Philippines and Australia. **The sun never sets on *Five Wishes*!**

Growing impact

- In 2022 more than 4,000 new organizations and tens of thousands of individuals utilized *Five Wishes* resources.
- *Five Wishes* partners include Humana, VITAS Healthcare, Gentiva, Sibley Memorial Hospital, Johns Hopkins HealthCare, WellSpan Health and Sparrow Health System.
- Corporations and government agencies, including Federated Hermes, Fannie Mae, the U.S. Department of State, the U.S. Department of Justice, Delta Air Lines and 3M, have provided *Five Wishes* to their employees.
- *Five Wishes* continues to be the top choice for health care professionals across the nation, and some 75% of *Five Wishes* products are sold to health care providers.
- *Five Wishes Digital* (formerly *Five Wishes Online*) was updated and enhanced to allow users to complete and sign the advance directive online. Thousands were downloaded in 2022 from the new online store.



Training the 21st century's health care clinicians and professionals

Five Wishes' educational and outreach efforts grew exponentially and reached tens of thousands of health care providers, caregivers and their advocates in 2022.

- More than 36,000 physicians, nurse practitioners, social workers and clinicians have used *Five Wishes'* training resources in recent years.
- Over 18,000 clinicians have completed the *Five Wishes* advance care planning online training modules.
- Thousands of clinicians and professionals across the U.S. participated in *Five Wishes* training programs in 2022, including those with Davis Health System Foundation, United Physicians, the Florida Hospice & Palliative Care Association, University of Maryland, Catholic Financial Life, the Institute for Nonprofit Innovation and Excellence, and Humana.
- In April the Society for Human Resource Management (SHRM), with over 300,000-member organizations, offered a *Five Wishes* webinar that was well attended and received. SHRM's own employees use *Five Wishes*.



Arizona End of Life Care Partnership (EOLCP)

This past year *Five Wishes* partnered with the EOLCP to focus on advance care planning

within workplaces. The EOLCP, anchored at the United Way of Tucson and Southern Arizona, is a cross-sector, cross-organizational partnership that has become a national model of community collaboration and impact.

The collaborative project with *Five Wishes* includes a pilot within United Way to normalize advance care planning through workplaces.

"If our loved ones know what we want and what's important to us — then they aren't burdened later wondering about the decisions that they had to make for us," says Sarah Ascher, EOLCP associate vice president. "*Five Wishes* is an integral part of achieving our EOLCP mission to enhance the way we live by fundamentally changing the way we talk about death."



AdventHealth Central Florida pilot program

As the new executive medical director of palliative care for AdventHealth's Central

Florida division, Dr. David Buxton noticed that *Five Wishes* was preferred by its clinicians and health care workers who lacked a unified approach for implementing advance directives. He also observed that Epic, the hospital system's electronic medical records and patient portal system, offered a document that was difficult to understand and use.

Buxton saw a unique opportunity to create a unified health care experience and integrate *Five Wishes* into his division's efforts through a new pilot program. Its goal is to create a communications system among clinicians, patients and families and a customized training, workflow and evaluation process. Upon the successful completion of the pilot, the program will be implemented at additional sites within AdventHealth, one of the largest non-profit health systems in the nation.



Dr. Debra King, CEO, Chief Clinical Officer and Clinical Director of Behavioral Health, Family Care Services, Greenville, S.C.

Dr. Debra King likes to find tools her students can use to help people deal with difficult emotional issues, such as broaching the challenging subject of dying.

"Death — looking at the end of life — is threatening. People don't want to do that," says King. Most want to run from it and alter reality, she adds.

She likes *Five Wishes* because It is an attractive, simple, easy-to-use and affordable document that uses non-threatening, friendly language to talk about a challenging subject.

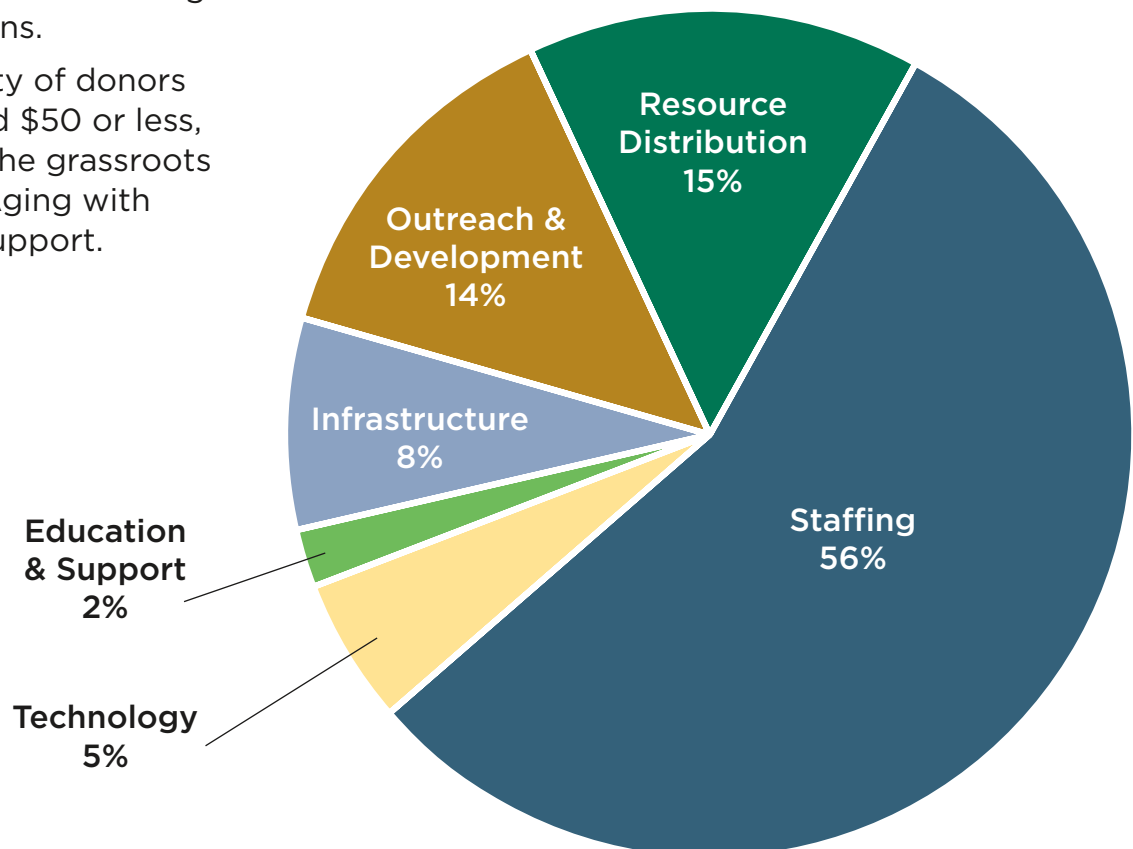
She says the document gives control to those who use it — it allows them to think about sensitive issues before it is needed. "It allows them to say, 'This is how I want my life to be,'" King says.

2022 Financials

For more than 25 years Aging with Dignity has provided advocacy, support and services to individuals and families regardless of their ability to pay for them. No one has ever been turned away for lack of resources. This is possible because of our generous donors and loyal *Five Wishes* customers.

Aging with Dignity's 2022 budget of \$2.5 million funded the efforts of the Tallahassee, Florida and Washington, D.C. offices, accelerated the growth of *Five Wishes*, America's premier advance care planning program, and amplified our advocacy for the elderly, disabled and mentally ill. Charitable contributions over the last several years and steady sales revenue from *Five Wishes* programs and services strengthened Aging with Dignity's financial stability during the Covid years and position us to have an even greater impact in the years ahead.

- More than 90% of revenue is from diversified public support, far exceeding the IRS threshold for determining a public charity.
- Since 2020, more than 6,000 people supported Aging with Dignity's mission through individual contributions.
- The majority of donors contributed \$50 or less, reflecting the grassroots nature of Aging with Dignity's support.
- Less than 5% of the 2022 budget was spent on fundraising or related management costs.
- 60% of expenses facilitate the provision of AWD's programs and services, and 40% for advocacy.



Aging with Dignity Board of Directors



Guy Smith, *Chairman and Founding Director*

Smith has had a distinguished corporate career overseeing long-term care facilities

in the United States and Canada and most recently was the co-founder of Harmony Living Centers, a family-focused network of 19 assisted living facilities in Wisconsin. He remains active on the national and Milwaukee boards of the Boys & Girls Clubs of America.



E. Zimmermann Boulos, *Vice-Chairman and Founding Director*

Boulos is the president of Office Environments & Services, Jacksonville,

Florida, a company he has led for over 40 years, and also serves on the Board of Directors of American Forests.



Robert M. Brochin, *Founding Director*

Brochin is a partner of the Miami, Florida, office of Morgan Lewis. He served as deputy

general counsel to the governor of Florida and later as its inspector general.



Patricia Russell, *Secretary and Founding Director*

Russell is certified in clinical pastoral care through Advocate

Lutheran General Hospital, Park Ridge, Illinois, and is involved in elder care and hospice advocacy in her home state and southwest Florida.



James C. Capretta, *Director*

Capretta holds the Milton Friedman Chair and is a senior fellow at the American Enterprise

Institute, as well as a senior adviser to the Bipartisan Policy Center, both in Washington, D.C.



Mary McElroy, *Director*

McElroy is the senior vice president of hospice services with Community Hospice & Palliative Care,

Jacksonville, Florida, one of the nation's largest non-profit hospice providers, where she has served since 2009.



Tonja Myles, *Director*

Myles is the co-founder and executive director of Set Free addiction recovery services and the Set Free Indeed

ministry in Baton Rouge, Louisiana.



**Ron Retzke, Ph.D.,
*Director***

Retzke is president of Retzke & Associates, Inc. in Wisconsin and has served as a consultant

to multiple health and long-term care providers and also to nonprofit organizations. He is also on the board of directors of the Ice Age Trail Alliance.



**Jim Towey, *Founder,
Chief Executive Officer
and Director***

Jim Towey is the founder and chief executive officer of Aging with

Dignity. His career includes the presidency of two Catholic universities and service on the senior staff of U.S. President George W. Bush.



John Scalia, *Director*

Scalia serves as general counsel for Barton & Associates, Inc., a national health care staffing firm. He is based

in its West Palm Beach, Florida, office.

Aging with Dignity Executive Leadership



**Paul Malley, *Aging with
Dignity President***

Malley is president of Aging with Dignity and directs its day-to-day activities and oversees

its education, research and training programs. He has served Aging with Dignity for 24 years.



**Dave Simison, *Aging
with Dignity Vice
President of Operations***

Simison has served as vice president of operations for 17 years

and manages the financial, information technology and sales order fulfillment activities.



**Joanne Eason, *Five
Wishes President***

Eason is president of *Five Wishes*. For eight years she has led the marketing, sales and

promotion efforts for *Five Wishes* and is the principal liaison with leading health care, hospice and human resource officers and those comprising the nationwide network of distributors.



**Ed Towey, *Vice
President of Advocacy***

Ed Towey is Aging with Dignity's Vice President of Advocacy and for 14 years has been

responsible for communications, media relations and website management.

Aging with Dignity Offices

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Your Right. Our Mission.