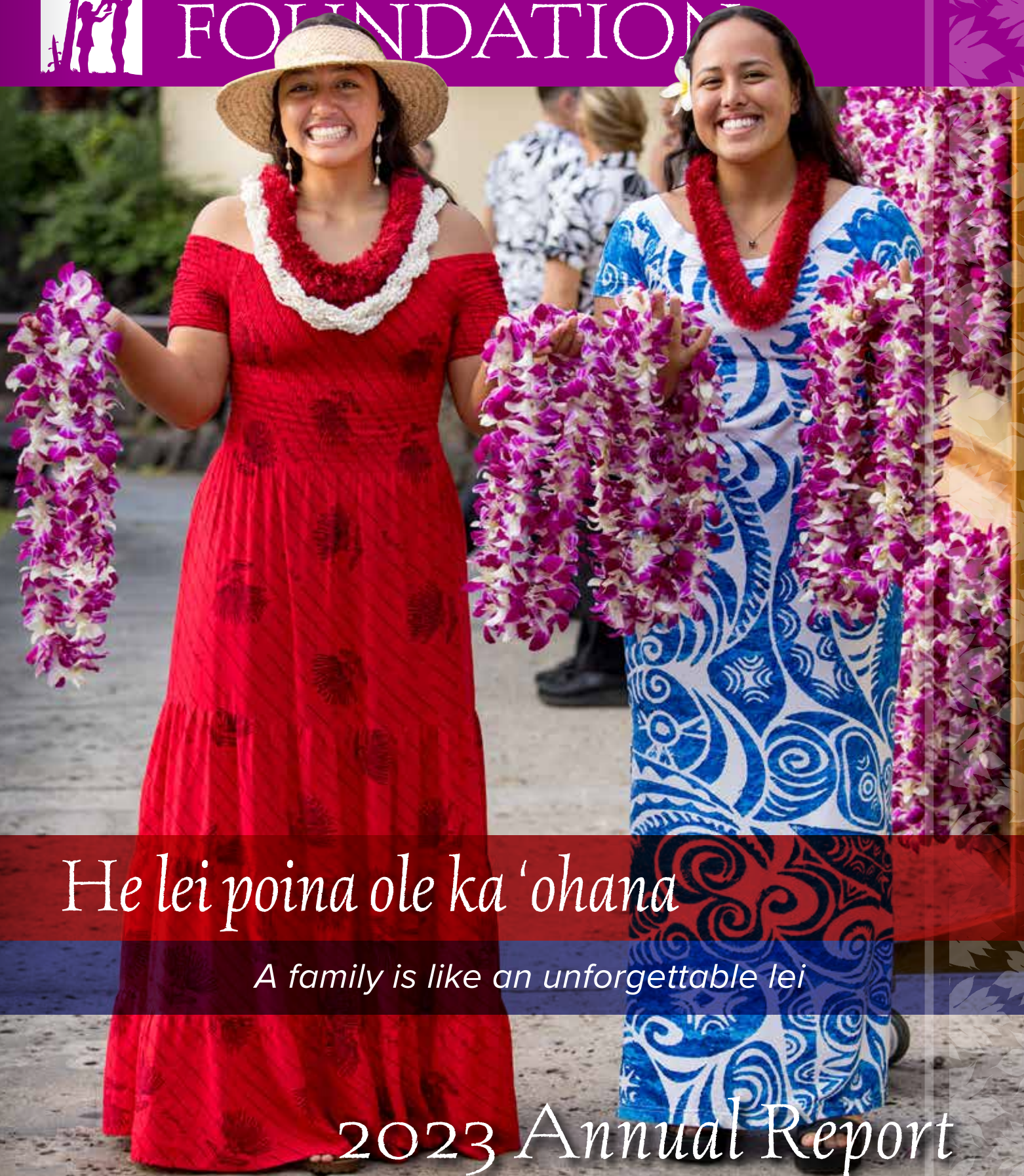




HUALĀLAI 'OHANA FOUNDATION



He lei pōina ole ka 'ohana

A family is like an unforgettable lei

2023 Annual Report

He lei pōina ole ka 'ohana

A Family Is Like An Unforgettable Lei

2023 was a year of celebration honoring the 20th year of the Hualālai 'Ohana Foundation, a year of gratitude for the families we serve and the community we are proud to be part of.

Together with our donors and volunteers, the Hualālai 'Ohana Foundation weaves together an unforgettable lei, directing support to more families than ever before.

Celebrating 20 Years: A Journey of Philanthropy and Community

In Hawaiian culture, the lei is a symbol of love, friendship, celebration, honor, and greeting, embodying the spirit of Aloha. In ancient Hawai'i, wearing a lei represented wealth, royalty, and rank, and also symbolized the spiritual *mana*, or energy, of both the wearer and creator. With each flower strung onto the garland, intentions of friendship, honor, and celebration are woven together.



The Hualālai 'Ohana Foundation's first 20 years have meant that over 10,000 families have accessed support, directing over \$20M in financial assistance to the workforce of Hualālai Resort. Stories of impact have been multi-generational, spanning from founding employees in 1996 to their children and grandchildren. A lei aloha woven together by Hualālai's multi-generational family, people who started out as strangers and quickly became friends and later a close-knit family, a

community grounded in this beautiful ahupua'a of Ka'ūpūlehu. Together, we have built a legacy of love, honor, and unity, reflecting a true expression of aloha. Our kaiaulu, a community, village or neighborhood is where family begins, and the rest of the world stops in time to listen to its heartbeat.

Since our inception, the Foundation has remained dedicated to our mission, adapting and evolving to meet the ever-changing needs of those we serve. Our programs have touched countless lives, providing essential resources, education, and support that have paved the way for brighter futures. The impact is reflected in the stories of transformation and success shared by those who have benefited from your generosity.

This milestone is not just a celebration of our past achievements but also a beacon guiding us toward the future. As we look ahead, we are more determined than ever to expand our reach, innovate our programs, and deepen impact. We are committed to building on the solid foundation laid over the past 20 years, ensuring hope and opportunity for generations to come.

Thank you for being a part of our journey. Here's to the next 20 years of making a difference, one 'ohana at a time.

"It takes a village, but in our case, it takes an 'OHANA." - K. Ferguson



Making Futures Possible Through Education

Throughout 2023, the Foundation remained committed to making futures possible for the Hualālai's workforce community. We provided essential support to ensure access to college education and vocational training for first-

generation students and lifelong learners. By supporting PreK-12 education and promoting child literacy across Hawai'i, we are nurturing the next generation's potential.

Nurturing Health & Wellness

Medical financial assistance programs at the Hualālai 'Ohana Foundation include support for serious emergent medical crises including medically necessary surgical and dental procedures and provisions of wraparound hardship assistance for unexpected emergencies brought on by medical crisis. These programs direct funding

to cover medical travel expenses and remaining out-of-pocket costs left after insurance payouts. These programs ground the Foundation's mission and original founding charter and continue to catalyze hope and support for employees and their families in times of need.

Listening to Community Needs

Listening to our community needs is at the heart of our mission. We are committed to understanding the challenges and aspirations of those we serve and to removing perceived barriers to access and opportunity. By meeting students and families

where they are and during their times of need, we ensure that our programs are responsive and impactful. Together, we are creating a better Hawai'i for all.

Transforming Lives Through Focus and Generosity

In 2023, the Foundation concentrated on three key areas:

- **Community & Collaboration**
- **Innovation & Impact**
- **Education & Well-being**

Philanthropy Fuels Excellence

Philanthropy generates momentum that drives us towards excellence. With the generosity of our

donors, the Hualālai 'Ohana Foundation continues to grow and achieve.

MAHALO FOR YOUR GENEROSITY

Our Mission

The heart of the Hualālai 'Ohana Foundation's mission is supporting the educational goals, health and well-being of Hualālai Resort's working families while providing a way for residents to contribute to the aloha spirit and enlightened sense of 'ohana within our uniquely blessed community.

Our Values

Aloha **LOVE, COMPASSION**

We give of ourselves when we give from our heart. Hualālai embodies aloha in so many ways, yet most importantly through the *aloha* spirit of its people. Our goal is to connect our donors to meaningful opportunities to help make a difference in the lives of Hualālai's workforce.

'Ohana **FAMILY**

We believe the generosity within our uniquely blessed community creates 'ohana. We are connected and care for each other. We want the best for our family members. We serve those who are 'ohana in our hearts. Your 'ohana nourishes you.

Kōkua **HELP OTHERS**

We were created to give help to our 'ohana and this value continues to guide our actions each day. We strive to help those who wish to help their families grow and thrive. *Kōkua aku, kōkua mai.*

Ho'okō **COMMITMENT**

We are committed to our goal of providing opportunities where many do not exist. We do so with *pono* (integrity) and *lokahi* (unity).

Mahalo **APPRECIATION**

More than merely 'thank you', *mahalo* represents the gratitude, appreciation and esteem. This sincere appreciation for the aloha shown by people of Hualālai inspired our homeowners to create the Hualālai 'Ohana Foundation and continues to guide our mission today.

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Medical & Financial Assistance

Bringing Health and Wellness to Hualālai's Workforce Families, Now and for the Future

In 2023, the Foundation provided life-changing support through three medical financial assistance awards:

Dental Award: Covers up to \$1,000 per individual for urgent and medically necessary dental procedures and surgeries. This includes insurance-eligible oral surgeries, braces, and extractions.

Surgical Award: Provides up to \$3,000 per person per year for out-of-pocket surgical costs and related travel expenses.

Serious Medical Award: Offers financial support for the most serious cases, with no cap on the award amount, ensuring immediate help where it counts.

Without additional financial support, even out-of-pocket costs and copays can mean the difference between delaying care or accessing necessary healthcare to live well and thrive. The Hualālai 'Ohana Foundation is committed to supporting the well-being of Hualālai's workforce families through these medical awards.

In 2023, the Foundation directed \$302,013 to the health and well-being of Hualālai's workforce families through medical awards. Here's a glimpse of the impact:

Average amount spent on life-threatening medical awards:
\$4,018

Surgical Awards
34

Exceptional Circumstances / Hardship:
17

Number of families helped:
176

Dental Awards
87

Serious Medical Awards
29

Average amount spent on medical awards:
\$1,716

Join us in making a difference. Learn more about our programs and how you can help at HualalaiOhanaFoundation.org. Together, we can ensure that every family in West Hawai'i has access to the healthcare they need to live well and thrive.

"Kaley's health is slowly improving. We're thrilled to report that she's graduated from high school! Thank you to everyone for your support, thoughts, and prayers through this difficult time."

- Andrew M.



Education Programs

In 2023, the support of Hualālai homeowners and donors made it possible for the Hualālai 'Ohana Foundation to reach more families than ever before. Three core themes guided our focus in 2023:

CULTIVATING EXCELLENCE, INSPIRING FUTURES

Our Educational Programs are designed to cultivate academic excellence and inspire students to achieve their fullest potential. By offering comprehensive support and resources, we empower the next generation to build a brighter future.

Key Programs

- Academic Incentive Awards
- Higher Education Scholarships
- Hualālai Scholars

EMPOWERING FAMILIES, STRENGTHENING COMMUNITIES

We believe in the power of education to transform lives and uplift communities. Our initiatives provide vital support to families, ensuring every child has the opportunity to succeed and contribute to the community's growth and prosperity.

Key Programs

- PreK-12 Scholarships
- Keiki Literacy & Learning Award
- Summer Camp at Kalaemanō

FOSTERING LIFELONG LEARNING AND DEVELOPMENT

Education is a lifelong journey, and we are committed to supporting individuals at every stage. Our programs foster continuous personal and professional development, equipping learners with the skills and knowledge needed to thrive in an ever-changing world.

Key Programs

- Lifelong Learning Award
- Technology Award
- Work for College Match



\$900,000 DIRECTED TO
658 EDUCATION AWARDS
IN 2023 - A 20% INCREASE OVER
PREVIOUS YEAR'S AWARDS.

"We wanted to send a Big Mahalo to the Hualālai Ohana Foundation and Donors. My oldest daughter Jaedyn Afaga graduated on May 10th from Christian Life Bible College in Stockton California with her Bachelors degree in Business with Highest Honors and became Valedictorian. She wouldn't be able to do it without the help from the scholarship program, college work match and the College merit award. We cannot Thank you enough. We are very grateful for this."

"I am humbled and grateful to be a recipient of the Academic Merit Award and the Higher Education Scholarship. These awards have benefited me in ways that extend beyond my deepest appreciation. Being from Hawaii and a part of a lahui, you have the duty of caring for the little ones in your life. My love for kids has guided me to this career path of becoming a pediatrician. Mahalo for providing students like me with such a wonderful opportunity. I am forever indebted."

- Savannah

'AINA - Academic Incentive Awards

88

HONOR ROLL AWARDS given in 2023.

20

ACADEMIC MERIT AWARDS given in 2023.

29

WORK FOR COLLEGE MATCH AWARDS given in 2023.



LEAP - Learning Enrichment Awards

95

LIFELONG LEARNING AWARDS and \$150,000 given in 2023. (100% increase over previous year)

15

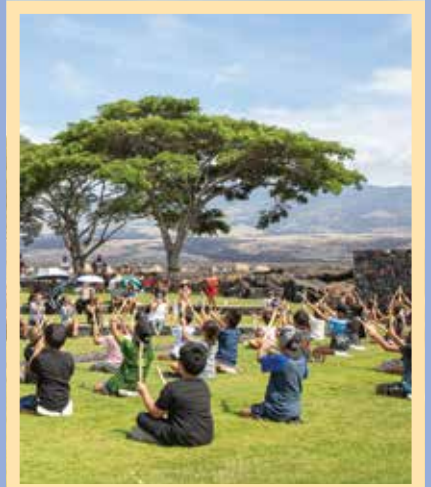
TECHNOLOGY AWARDS given in 2023.

237

KEIKI LITERACY AWARDS given in 2023. (70% increase over previous year)

40

KALAEMANŌ SUMMER CAMP participants in 2023.



Scholarships

82

PREK-12 SCHOLARSHIPS and \$290,000 awarded in 2023.

48

HIGHER EDUCATION SCHOLARSHIPS and \$290,000 awarded in 2023.

4

HUALĀLAI SCHOLARS awards given in 2023.



2023 Hōkū Society Donors

The Hualālai 'Ohana Foundation would like to thank the following donors for their transformative support over the past year covering gifts made in 2023. Thank you for your partnership and advocacy on behalf of Hualālai's growing 'ohana.

Hōkū Society Donors : The Hōkū Society is the Hualālai 'Ohana Foundation's top donor recognition society acknowledging the foundation's philanthropic stars. Individual donors who give at least \$15,000 each year comprise this most exclusive group of philanthropists who light the path forward for Hualālai's future 'ohana.

\$300,000+

The Bob & Renee Parsons Foundation

\$150,000 to \$299,999

Edward & Susan Mueller

\$100,000+

Hualālai Investors / Hualālai Realty

\$50,000 - \$99,999

Anonymous

Dr. Bradley Chipps & Kathy Kehoe

Marti deBenedetti

Emily & Mark Spencer 'Ohana

\$25,000-\$49,999

Bochnowski Family Foundation

Dennis & Mireille Gillings Foundation

The Adi & Jerry Greenberg Foundation

Ted & Tanya Jernigan

Susan Johns

Debi Justice Bodine & Murray Bodine

Larry & Mary Jane Kelley

Kathryn Kimball

Lane Charitable Fund

Sarah & John Lechleiter

Tom & Sara Lewis

Jim & Cheryl Markham

Seybold Family Charitable Gift Fund

Stadter Family Charitable Gift Fund

Gerard & Katherine Tobin

Jim & Mimi Weinstein Foundation

Bob & Stella Zamarripa Family Charitable Fund

\$15,000 - \$24,999

Eve Bernstein & Alex Gersznowicz

Borgman Family Charitable Fund

The Finnie Family Fund

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Family Charitable Fund

Rick Kimball & Rose Repetto

Janet Love & Jack S. Mustoe

McPhail Family Fund

The Roberts Foundation

David & Lisa Vanacore

Andy & Amanda Warner

Mark Zurack & Kathy Ferguson Foundation

Mahalo to our
generous donors

\$10,000 - \$14,999

Mark & Maureen Adams
Tom & Marj Callinan
MaryBee Chan Johnston
Sam & Tricia Colella
Coit Family Foundation
Mem Dryan Bernstein
Norma Foster Maddy & Doug Parks
Mark & Gail Edwards
Dave & Liesa Guenther
Glenn & Marianne Guenther

Holley Family Charitable Fund
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Edward & Jill Im
Mark Kawashima
Keyes Foundation
Rob & Barbara Kildow
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John & Martha Mouer
Wendy Paskin-Jordan & AAA

Robert Perry-Smith
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Joe & Teresa Schneider
The Spiliotis Family
David N. Strohm & Kathryn A. Reavis
Taube Family Foundation
Anthony & Beatrice Welters
Elliott & Sara Wilson
Julie Wrigley & Bill McDowell

\$5,000 - \$9,999

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Joy & Leon Dreimann
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Hans & Elaine Riddervold
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Robert & Terry Samuel
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Tuftin Family Foundation
Joan J. Zelnio

\$2,500 - \$4,999

Stephen Bennett & Marsha Jordan
Stephen Blanchard & Debby Webster
Scott & Renee Bowie
Alex Earls
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The One Eight Fund
Ed & Cathy O'Neill
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\$1,000 - \$2,499

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Barry & Frankie Sholem
Allen & Susan Tochihara
Ku'uipo Valenzuela
Mark & Gina Willman
Tom & Diane Windler

2023 HUALĀLAI JUBILEE & OTHER IN-KIND

BDT & MSD Partners
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Marj & Tom Callinan
Chambers Landscaping
Chicago Magic Lounge
Don & Ellen Clark
Cuvee
Encore Presentation Services
Charles & Ivette Esserman
Fairmont Miramar Hotel & Bungalows
Four Seasons Bora Bora
Four Seasons Hotel Seattle
Four Seasons Maui at Wailea
Four Seasons Vail
Harry & Susan Frampton
GM Construction
Tim & Cathy Gonzalez
Dave & Liesa Guenther

Gypsea Gelato
Hualālai Spa
Bob & Judy Huret
Susie Johns
Larry & Mary Jane Kelley
Rick Kimball
Kohanaiki Golf
Kona Brewing Company
Koru Medical Spa
Valerie & Kyle Largent
Erin Lee & Hualālai Landscaping
Diane & Roger Lewis
Elliot & Sharon Maluth
Cheryl & Jim Markham
Dean & Yuriko McPhail
Susan Mendelson & Jack Lutsky
Merriman's Restaurant
Mikimoto America
Cindy & Moe Muscatel
Garret Okamura & Nanea

Charlie Parker
Jeff Probst / Survivor
Roadtrips - The Ultimate in Sports Travel
SJ Communications
Smart Homes US
Emily & Mark Spencer 'Ohana
Sundot Hawaii
Tiffany's Art Agency
Lex Van Hessen
David & Lisa Vanacore
Carl & Robin Washington
Drs. Jim & Mimi Weinstein
Mark Willman
Willman Interiors
Wilson Collective Haircare
The World Residences at Sea

*Mahalo to our
generous donors*

Legacy Gift Opportunities

BUILDING A LASTING LEGACY WITH YOUR GENEROSITY

At the Hualālai ‘Ohana Foundation, we are deeply grateful for the incredible support from our community. Your contributions enable us to continue our mission of supporting deserving workforce families and fostering a vibrant and thriving ‘ohana. This year, we are excited to highlight an impactful way for you to leave a legacy through legacy gift opportunities.

THE POWER OF LEGACY GIFTS

Legacy gifts are a powerful way to ensure your values and commitment to Hualālai’s ‘ohana endure for generations to come. By including the Hualālai ‘Ohana Foundation in your estate planning, you can make a significant impact that extends far beyond your lifetime. Legacy gifts provide vital resources that allow the Foundation to plan, respond to emerging needs, and sustain essential programs.

DEFERRED LEGACY GIFTS

1. Bequests: A bequest is a gift made through your will or living trust. You can designate a specific amount, a percentage of your estate, or the remainder of your estate after other bequests have been fulfilled. Bequests are a simple yet profound way to support our mission without affecting your current financial situation.

2. Beneficiary Designations: You can name the Hualālai ‘Ohana Foundation as a beneficiary of your retirement accounts, life insurance policies, or other financial accounts. This type of gift is easy to arrange and can provide substantial support to our foundation while offering potential tax benefits to your estate.

3. Charitable Remainder Trusts: Charitable remainder trusts allow you to receive income from your assets during your lifetime, with the remainder going to the Hualālai ‘Ohana Foundation. This type of gift provides financial security for you and your loved ones while ensuring a lasting contribution to our cause.

LEGACY GIVING TODAY

Qualified Charitable Distributions (QCDs): Individuals aged 70½ or older can make a Qualified Charitable Distribution directly from their IRA to the Hualālai ‘Ohana Foundation. This allows you to fulfill your Required Minimum Distribution (RMD) and support our work without incurring income tax on the distribution. As of 2024, individuals with IRAs must take RMDs starting at age 73, due to recent changes in legislation; you may donate up to \$100,000 per year, per individual. The transfer must be directly from your IRA to Hualālai ‘Ohana Foundation.

HOW TO GET STARTED

Creating a legacy gift is a thoughtful and meaningful way to support the Hualālai ‘Ohana Foundation. We encourage you to discuss your options with your financial advisor or estate planner. For more information, please contact our office at 808-325-4701 or email legacy@hualalaiohanafoundation.org.

Mahalo nui loa for considering a legacy gift to the Hualālai ‘Ohana Foundation. Your foresight and generosity ensure that our mission will continue to thrive, bringing hope and support to the families of Hualālai for generations to come.

Together, we can build a legacy of compassion, community, and lasting impact.

Aiden's Journey

Inspiring a New Generation:

A DREAM REALIZED THROUGH YOUR GENEROSITY

Thanks to your generosity, one employee is now on the path to achieving his dream of inspiring a passion for golf in others.

AIDEN'S STORY: FROM BROOKLYN TO HUALĀLAI

Four Seasons Golf House Attendant Aiden Rodriguez began playing golf at the age of 10. Growing up in Brooklyn, New York, with two working parents, there weren't many opportunities to play consistently. His role at Hualālai has provided him the ability to practice and hone his skills to such a degree that he decided to undertake the PGA PGM Associate Program. To be eligible to register for the PGA PGM, players must complete four Qualifying Level courses and pass the rigorous Playing Ability Test (PAT) administered by the PGA. Fewer than 20% of those who attempt the PAT achieve passing scores.

A MILESTONE ACHIEVEMENT

In June 2023, Aiden became one of these elite players who passed the test. "Thanks to the hard work I put in to improve my game and to the outstanding support and guidance I received from my supervisor Ryan Coyle, I was the only person who qualified with a score of 152 for two back-to-back 18-hole rounds." Aiden's accomplishments on the course have motivated

him to complete the rest of the academic requirements for the PGA PGM Associate Program, which includes online coursework and travel to PGA facilities for additional training and certification.

LOOKING TO THE FUTURE

"I believe that completing the PGM Associate Program will enhance my job performance and bring value to the Four Seasons Hualālai. This broader understanding of golf course operations and management will make me more aware of the needs of our team and better able to support my supervisors. This means Four Seasons guests will benefit from the best possible experience at our facilities and on our courses."



CONTINUED PROGRESS AND DEDICATION

Since completing the Qualifying Level courses and PAT, Aiden's handicap has continued to drop from a 7.1 at the time of his qualifying test to a 4.7, putting him in the top 10% of men's handicaps worldwide. Aiden has begun

the Level 1 coursework, which encompasses Facilities Management and Teaching & Coaching classes, as well as a week-long in-person seminar at the state-of-the-art PGA facility in Frisco, Texas.

SPREADING THE LOVE OF GOLF

"I am excited to spread my love of the game to the next generation of golfers," says Aiden.

Jason Falcone

Workforce Development: One Oyster at a Time

NURTURING SUSTAINABILITY IN AQUACULTURE

Jason Falcone, a Natural Resource Specialist at Four Seasons Hualālai, has one of the most unique and engaging jobs on the Hualālai property. He manages the resort's oyster and shrimp aquaculture programs, helps maintain the ponds, and monitors over 1,000 fish residing in King's Pond.

"The pond where the oysters are raised is a dynamic ecosystem abundant with micro- and macro-algae, microorganisms, fish, and shrimp. This diversity creates an ideal environment for oysters to grow as they feed in nutrient-rich water," Jason explains.

Because of your support of Hualālai 'Ohana Foundation's vocational training and workforce development programs, Jason comes to work every day with advanced knowledge in his field.

ADVANCING SUSTAINABLE SEAFOOD PRODUCTION

Jason set a goal to enhance oyster production to provide more sustainable seafood options for Four Seasons Hualālai guests. To achieve this, he sought out the Aquaculture America Conference, an annual world-renowned gathering of aquaculturists, scientists, biologists, conservationists, researchers, and fisheries science experts. Jason applied for a LEAP Lifelong Learning Award to attend the conference, where he learned about

advancements in aquaculture, collaborated with specialists, and shared data to reach common goals. The knowledge he gained at the conference will enable Jason to apply new methods in the Hualālai oyster beds and share scientific advancements in aquaculture with his peers in the Natural Resource Department.

INNOVATIVE TECHNIQUES AND PROFESSIONAL GROWTH

"One noteworthy takeaway was implementing a high salinity bath for the oysters. This health treatment will reduce algae and sponge growth on their shells, resulting in healthier, faster-growing oysters," says Jason. *"From participating in this influential event, I have grown professionally and made valuable connections in the aquaculture field. This opportunity would not have been possible without the Hualālai 'Ohana Foundation, and I am beyond thankful they could help further my career goals."*



THANK YOU FOR YOUR SUPPORT

Your support makes stories like Jason's possible. Thanks

to your generosity, Jason can continue to innovate and advance sustainable practices in aquaculture, benefiting both the environment and the guests of Four Seasons Hualālai. Thank you for your continued commitment to the Hualālai 'Ohana Foundation. Together, we are fostering a sustainable future, one oyster at a time.

Sake Lavaka

Medical Testimonial

A JOURNEY THROUGH UNCERTAINTY AND HOPE

In January 2023, Four Seasons People & Culture Manager Sake Lavaka and his pregnant wife, Kacy, faced a parent's greatest fear—the possibility of losing a child. When Kacy unexpectedly went into preterm labor, she was medically evacuated to Kaiser Moanalua Hospital on O'ahu. There, she gave birth to their second son, 'Ofakimuli, at just 24 weeks. In those harrowing moments, they were uncertain if their son would survive.

A TIME OF FEAR AND DETERMINATION

"The first week was the scariest as his chance of survival was still 50/50, and it was too early to tell what complications might develop," Sake recalls. After the initial week in the Neonatal Intensive Care Unit (NICU), the Lavaka family decided that the best course of action was for Kacy to stay on Oahu with the baby, while Sake returned to Kona with their son Kesomi to resume school and work.

That's when I reached out to the Hualālai 'Ohana Foundation for help. Sake applied for a Medical Assistance Award to support 'Ofa's mounting expenses in the NICU that were not covered by insurance.

FOCUS ON HEALING, THANKS TO YOUR SUPPORT

"The financial support from the Hualālai 'Ohana Foundation meant that we could focus on 'Ofa's growth and progress during those long months," Sake shares. Thankfully, baby 'Ofa responded

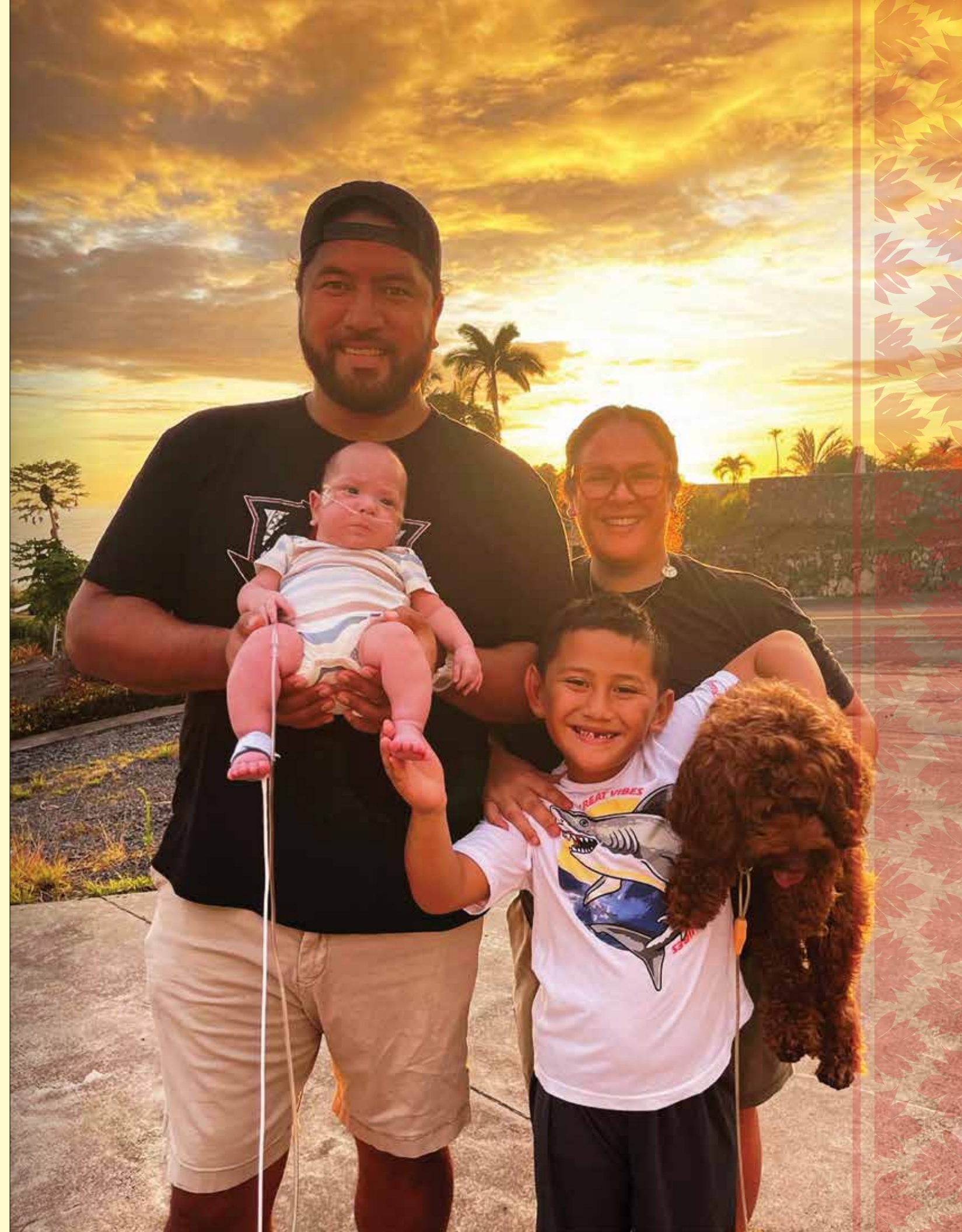
well to treatments and supportive care. He continued to make progress each week until he was able to come home in June 2023 and finally meet his big brother in person.

A BRIGHT FUTURE AHEAD

"When 'Ofa was eventually discharged, we brought him home without the weight of any financial debt. 'Ofa is now approaching 16 months and I'm happy to add he is right on track developmentally—he has been completely off oxygen support since August of last year, has eight teeth now with more on the way, and just took his first steps last week! My family will forever be grateful to the Hualālai 'Ohana Foundation for your support."

THANK YOU FOR YOUR GENEROSITY

Your generosity makes it possible for families like the Lavakas to focus on what truly matters during challenging times. Here in Hawai'i, family is much more than who we are related to. Family is our community, the village around us who embrace us when times are challenging and when it feels like we are all alone. Because of you, the Lavaka 'ohana received the financial and emotional support they needed to make it through uncertain times. Thank you for your continued commitment to the Hualālai 'Ohana Foundation. Together, we are making a difference, one family at a time.



Hualālai Scholars:

Celebrating our 2023 First Generation Students

The Hualālai 'Ohana Scholars Award is a need-based scholarship for first-generation students, providing financial and academic support to Hawai'i high school graduates pursuing an undergraduate degree at a university in Hawai'i. The award offers \$10,000 per year and is renewable for up to eight semesters (four years), contingent on academic standing, participation in program events and activities, and community service projects.

Our scholars receive personalized mentoring and academic advising from the Hualālai 'Ohana Foundation Programs team. This support is tailored to address the unique needs of first-generation students, helping them navigate the challenges of college life and access resources at local schools in the State of Hawai'i.

Meet Our 2023 Scholars:



HUALĀLAI
'OHANA
SCHOLARS

Your generosity has made these opportunities possible, empowering these young leaders to achieve their dreams and make a lasting impact on their communities. Thank you for your continued support and commitment to the Hualālai 'Ohana Foundation.



AELYN IBARRA MEDINA

Aelyn, pictured with her sister Jade and father Victor Ibarra of Chambers Landscaping, is majoring in Environmental Design Architecture with minors in Art and Second Language Studies at the University of Hawai'i Mānoa. She maintains an impressive 3.64 GPA.



PŌMAIKA'I KEKAIKAMAHINE 'AULI'I MARIA ACOPA VARRON

Pōmai, the daughter of Jonathan Varron, an in-room Dining Server, is majoring in Business at Hawai'i Pacific University. She earned her Associate of Arts degree through dual credit courses while completing her high school diploma at Kamehameha Kapalama High School, graduating with a perfect 4.0 GPA.



TYLER JORDAN ACASIO

Tyler, the son of Rocky Acasio, Banquet Lead Houseman, is a Computer Science major at the University of Hawai'i Mānoa. Tyler graduated as Valedictorian from Konawaena High School, ranking first out of 189 students with a 4.0 GPA. He was also the MVP of the Varsity Tennis team and is passionate about playing the ukulele and guitar.



TRYSTNE NOZAKI

Trystne, the daughter of Landscaper Kip Nozaki, is an aspiring multimedia artist and entrepreneur majoring in Business at the University of Hawai'i Mānoa. A Kealahou High School graduate with a 4.0 GPA, Trystne has a passion for creating visually aesthetic images and has launched her own photography business.

Enriching Young Minds: Hualālai 'Ohana Foundation's Summer Program



"light" or "enlightenment" and representing learning, knowledge, and understanding.

Designed for young explorers who have completed grades Kindergarten to 5th, Hālau Lamakū engages children in activities, crafts, games, outdoor exploration, and observation grounded in Hawaiian culture, science, math, engineering, and art.

Our 2023 program, "Life on the Reef," focused on Hawai'i's reefs, allowing children to discover the underwater world. Over two weeks, from July 17-28, 40 children were delighted and surprised by the stunning ecosystem, learning

about coral colonies, scavenging creatures, and the vibrant colors of the reef.

In addition to the daily 8 am to 3 pm curriculum, each student received a new backpack filled with school supplies, a water bottle, a folding beach mat for outdoor observation and play, and a journal.

Over the summer, the Hualālai 'Ohana Foundation partnered with the University of Hawai'i Hilo and the 'Imiloa Center to bring a two-week summer enrichment program to Kona for the children of Hualālai's workforce for the third consecutive year. Held at the Kalaemanō Interpretive Center, the Hālau Lamakū program honors the luma, a native dry forest tree unique to Hawai'i, symbolizing

ACTIVITIES INCLUDED:

**LITTLE MOMENTS,
BIG IDEAS: REEF
CREATURE FEATURE**

**KEEPING OUR
OCEANS HEALTHY!**

**CEPHALOPODS:
SQUID DISSECTION**

**GYUTAKU FISH
PRINT MAKING**

**FISH OBSERVATION
AND DATA COLLECTION**

At the end of each week, families gathered with Hualālai 'Ohana Foundation volunteers and donors for a ho'ike, or performance, where students shared testimonials about their favorite aspects of the program.

Your generosity made this enriching experience possible, bringing joy and educational growth to the children of Hualālai's workforce. Thank you for your continued support and dedication to our community.

"So worth it! The staff is so trustworthy. They make so many new friends. The number of crafts and activities that they did kept our daughter so busy and she left everyday sharing what she did. This was her first year and she already can't wait for next year!"

This is a culturally-based program, located in a sacred place at Hualalai. The program allows our kids to learn from some of the most caring and passionate teachers there are on Hawai'i Island. Our children experience the true essence of aloha at this camp!

"My daughter loved seeing her friends again from last year. When I asked what her favorite part was, she enjoyed making the coral reef/creatures with the clay mold."

"This program gave our daughter a sense of confidence and independence. She said that from the first day, she felt comfortable and welcomed. She also enjoyed all the activities and crafts. Everyday she'd come home and tell us so many stories and it was so nice to see how this program helped her come out of her shell."



2023 Financials

2023 OPERATING REVENUE & SUPPORT

Total Revenue:\$3,143,770

Donations & Contributions: . \$1,064,974

- Individual Gifts \$1,064,974

Fundraising Events:\$1,163,211

- This includes our Hualālai Jubilee 20th Anniversary dinner, which raised \$740,079 and Brendan's 100 Holes, which raised \$120,000 in support of programs that benefit Hualālai's workforce families.

Investment Income:\$915,585

- Strategic investments have contributed \$915,585 to our financial health, ensuring sustainability.

2023 Total Operating Revenue & Support: \$3,143,770



■ Donations & Contributions \$1,064,974
 ■ Fundraising Events \$1,163,211
 ■ Investment Income \$915,585

Financial information for the year ended December 31, 2023. To review the complete 2023 Hualālai 'Ohana Foundation audited financials used for this data, please contact our office.

TOTAL EXPENSES

Total Expenses:\$1,906,987

Program Services:\$1,515,549

- Collectively, your contributions helped 860 Hualālai Resort workforce families access educational opportunity and medical financial assistance in 2023.

Management & General:\$160,868

- Efficient management ensures that funds given to the Foundation directly support our mission.

Fundraising:\$126,879

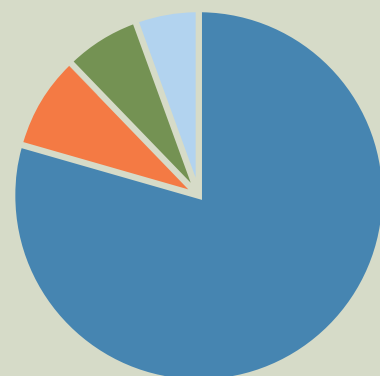
- Investments in fundraising events and campaigns have led to greater awareness of the Foundation's mission, broader participation among Hualālai homeowners and community, and have helped ensure that your donations go further. Hualālai 'Ohana Foundation's donor participation rate has increased 76% over the past 5 years and more homeowner residents and donors are giving than ever before. Thank you for your support of our mission and your participation in what makes us a true 'ohana!

Fair Market Value Cost of Tickets

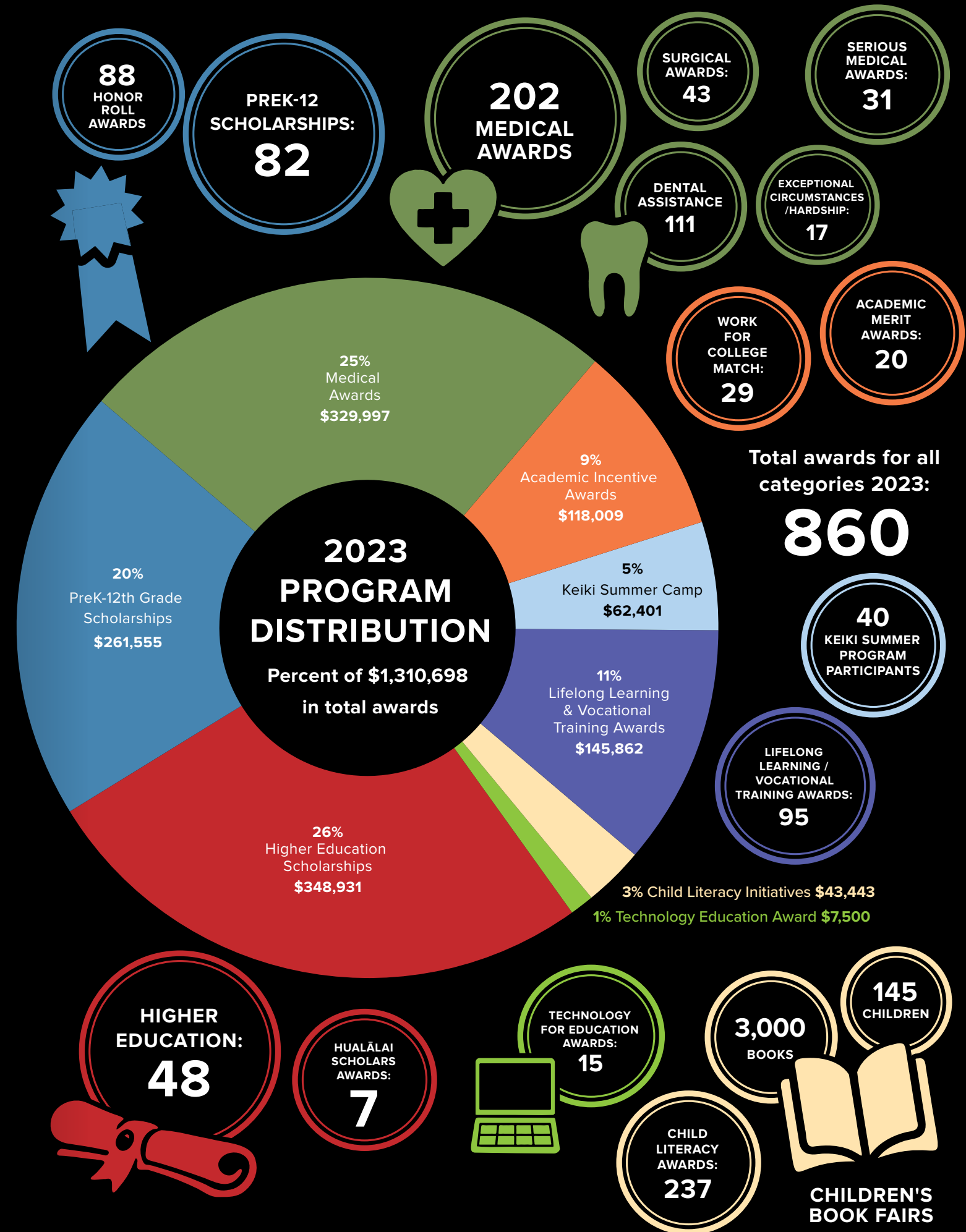
Paid to ProAm:\$104,539

- The 2023 Mitsubishi ProAm made it possible for 47 Hualālai homeowners to play with legendary professionals. Of the purchase of each \$5,500 ticket, \$3,300 in charitable support went to the Foundation programs with \$2,200 paid to the ProAm for the cost of goods and services received.

2023 Total Operating Expenses: \$1,906,987



■ Program Services \$1,515,549
 ■ Management & General \$160,868
 ■ Fundraising \$126,031
 ■ Fair Market Value Cost of Tickets paid to Pro Am \$104,539



Honor Roll 2023



The Hualālai 'Ohana Foundation Honor Roll Award is an academic incentive program designed to recognize and reward outstanding academic performance among Hualālai 'Ohana keiki. This program provides financial awards of \$150 for students in grades 6-8 and \$250 for students in grades 9-12 who achieve a minimum

GPA of 3.0 for the academic year. Offered annually, this program culminates in an awards ceremony held in the Hualālai ballroom.



At the 2023 awards ceremony, 88 deserving students were celebrated for their academic excellence. They were honored on stage in front of their families and peers, highlighting their achievements and dedication. The event welcomed 300 family members to a joyous morning celebration at Hualālai, fostering a sense of pride and community among the 'ohana and friends.

Your generous support makes this recognition possible, encouraging our youth to strive for academic excellence and empowering them to achieve their dreams. Thank you for being an integral part of our mission.



These are all words that people used to describe the Hualālai 'Ohana Foundation Honor Roll Award and what it means to their families:

Possibility, Generous, Loving, Spectacular, **HELPFUL**,
Understanding, Togetherness, Lokomaika'i, Best, **BLESSING**,
Kind, **COMPASSION**, **GRATEFUL**, Awesome,
SUPPORTIVE, Inspiration, Thankful, Mahalo Nui,
COMMUNITY, Amazing, **FAMILY**, **CARING**,
Empowerment, **ALOHA**, Giving, **'OHANA**, Kōkua,
Opportunity, Amazing, Special, Wonderful, Encouragement

PGA Championship Tour:

Pro-Am Supports
Hawai'i Island Families:
January 17-18, 2023

In 2023, Hualālai continued its tradition of securing one-day Pro-Am spots for Club Members, allowing them to play with legendary professionals while supporting a great cause. The entry fees from this event benefited the Hualālai 'Ohana Foundation, providing access to education and essential medical aid for employees and their families.

Members relished the opportunity to engage with renowned professionals, participating in a variety of activities during Championship week, including a welcome reception and draw party for contestants and their spouses, breakfast and lunch, a round of golf with a tee gift package, and the Pro-Am Dinner.



Since its inception in 2010, the Pro-Am has raised an impressive \$2,574,200 in support of Hualālai's workforce and their families. These funds have been instrumental in providing scholarship opportunities, medical financial assistance, child literacy initiatives, and vocational training resources to over 10,000 individuals and families.

The event was an exciting and meaningful experience for all involved, reflecting the community's collective commitment to making a positive impact here at Hualālai.

Giving Back

Hualālai Investors
& Hualālai Realty
Giving Back

Since 2022, the Hualālai 'Ohana Foundation has been honored to receive an annual gift of \$100,000 from Hualālai Investors & Hualālai Realty. This generous contribution acknowledges the profound impact the Foundation and its donors have on the well-being of local families

"This gift represents an investment in Hualālai's most valuable asset - its employees. We are privileged to play a part in helping families thrive, in providing opportunities for workforce development, and in supporting those who create lasting memories for our guests and residents."

Hualālai Realty



Our Programs:

‘ĀINA – ACADEMIC INCENTIVE AWARDS

- **Honor Roll Award:**
\$150 cash award for 6th-8th graders,
\$250 for 9th-12th graders
- **Academic Merit Award:**
\$500 for incoming college freshmen,
\$2,500 for continuing students
- **Work for College Match:**
\$1,500 summer earnings match

LEAP – LEARNING ENRICHMENT AWARDS

- **Lifelong Learning Award:** \$1,000 to \$3,000 in lifelong learning support
- **Technology Award:** \$500 to \$800 for the purchase of a computer, router, or printer
- **Keiki Literacy & Learning Award:**
\$250 per year for subscription-based learning programs

SCHOLARSHIPS

- **PreK-12 Scholarships:**
Needs-based – Preschool up to \$4k,
K-5 up to \$8k, 6-12 up to \$9k
- **Higher Education Scholarships:**
Needs-based up to \$15k
- **Hualālai Scholars:**
\$10k for first-generation college students studying at schools in Hawai‘i

SUMMER ENRICHMENT CAMP

- **Hālau Lamakū at Kalaemanō:**
2-week ‘āina-based learning camp
for keiki Grades 1-5 (\$1,500 per child)

MEDICAL FINANCIAL ASSISTANCE AWARD

- **Dental Assistance:** \$1,000
- **Surgical Assistance:** Up to \$3,000
- **Serious Medical Assistance**
- **Kako‘o Award for Hardship:**
Employees with 5+ years of service – case-by-case award

MINIMUM ELIGIBILITY REQUIREMENTS:

- Complete application with all required documentation submitted and signed by applicant
- Employee eligibility verification form
- Six months of service to Hualālai Resort as an independent contractor, vendor, service provider, or hotel employee
- At least 20 hours worked per week
- Household combined income must be less than \$195k

Hualālai ‘Ohana Foundation was established in 2002 as a 501(c)3 nonprofit organization to provide a vehicle to allow residents the opportunity to contribute to the well-being and aloha spirit of our uniquely blessed community.

HUALĀLAI ‘OHANA FOUNDATION

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Nico Leilani Verissimo, Executive Director
EIN#81-0570716