

AARP Foundation





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Dear Friends,

As I reflect on our work in 2024, it's clear how meaningful change happens — not through isolated actions, but through a sustained commitment that builds toward lasting impact. It can be captured in three words:

Connect. Empower. Transform.

Connect. The heart of our work at AARP Foundation is fostering connections. This year, we reached 1.18 million older adults with low income, connecting them to financial resources, job coaching and volunteer opportunities. When older adults connect — with support, with opportunities, with each other — possibilities multiply.

Empower. True change comes when people gain the tools, knowledge and confidence that empower them to act. In 2024, we expanded access to job training, financial resources and caregiver support through our new and expanded digital platforms. And more than 29,000 older adults found a sense of purpose through volunteering while fighting poverty in communities across the country.

Transform. The result of our work is transformation: for individuals, communities and systems. We invested in an improved process for automatic reenrollment in Medicaid benefits, laying the groundwork for a more streamlined, dependable system for everyone who relies on it. And we closed the year with a landmark civil rights legal victory for older adults with disabilities, proving that collective action can improve systems for everyone.

This work is only possible because of partners like you. Your support helps us build a future where everyone can age with dignity.

With gratitude,

Claire Casey

President, AARP Foundation



Financial Lifelines: Connecting Older Adults with Resources



We worked with

120,000

older adults with low income

Securing

\$350 million

in benefits

Escalating costs of groceries, health care and housing have compounded everyday financial hardships for millions of older adults.

At AARP Foundation, we worked with 120,000 older adults with low income to stabilize their finances, a 51 percent increase from 2023, and we connected them with additional sources of support, securing more than \$350 million in benefits. We reduced red tape involved with enrolling or re-enrolling in benefits. And we used technology to connect more people with high quality, locally relevant resources that improved their economic security.

Fighting Hunger, Improving Lives

In 2024, grocery prices were 24 percent higher than in 2020.¹ As food costs have climbed, the Supplemental Nutrition Assistance Program (SNAP) has become a lifeline for many older adults. The program helps people meet their basic nutritional needs, which in turn supports improved health and independence as they age.

The latest reporting shows that more than 10 million households with people 50 and older use SNAP each year to keep their families fed and healthy.²



Streamlining Support

Applying for safety net benefits can be incredibly complicated. In 2024, we funded community-based organizations to streamline the application process for older adults by connecting them to multiple benefits at one time.

Our local partners connected eligible seniors not just to SNAP or Medicaid, but to a range of benefits, including farmers market vouchers, transportation assistance, emergency funds, long-term care options, prescription discounts and property tax relief. A holistic approach is more efficient and puts more money in the pockets of older adults with low income.

More comprehensive support can make a major difference in someone's life. One 70-year-old man in Colorado Springs was homeless and without any safety net benefits when he connected with Benefits in Action, an AARP Foundation grantee. Their team helped him apply for Social Security, Medicare, Medicaid and SNAP, and he joined a recovery program. Through his own hard work, he was able to move into an apartment. Now he volunteers his time to help other seniors who are struggling, so they know with their own effort and a little extra help they can conquer their challenges.



On average, older adults in the communities we serve received \$205 a month in SNAP benefits.³

Our grantees connected seniors to an average of four federal, state and local benefits, significantly increasing the financial value to \$321 a month.



Hayward

Grantee

Natosha Hayward is a partner engagement manager at SC Thrive, an AARP Foundation grantee based in Columbia, SC that connects community members to resources, training and benefits. It's a "one-stop shop," helping clients find and apply for all the benefits that are available to them all in one place.

The stakes are high. For many seniors, accessing essential benefits can be the difference between increasing stability and deepening poverty. But many don't know how to begin the process. Some face practical barriers, lacking internet access or even a phone. Many fear rejection or stigma from receiving government support.

But in 2024 alone, SC Thrive made it easier for nearly 16,000 older adults to apply for multiple benefits.

Natosha understands how important a helping hand can be at a difficult time. She moved to a shelter with her infant son as a teen mom, and that temporary home had a lasting impact on her life. "So many people helped me get on my feet," she says. "They helped me get into college, find an apartment, childcare — everything I needed to be successful."

While at the shelter, Natosha was inspired to pursue a career path that eventually led to SC Thrive.

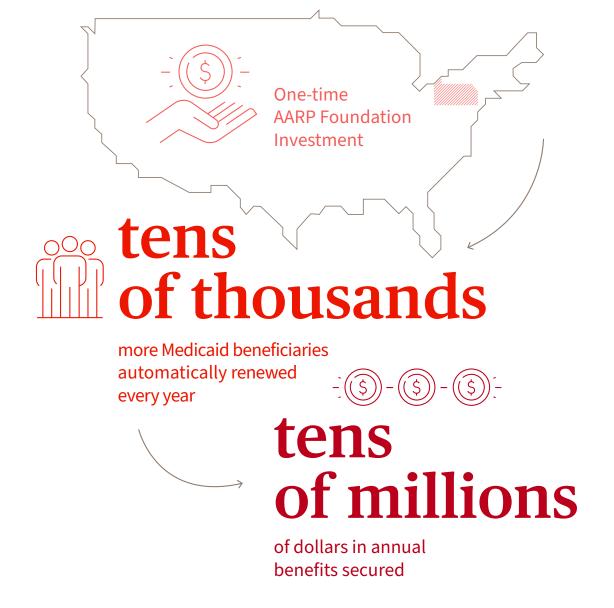
Transforming Safety Net Delivery

For many older adults, keeping their benefits can be as challenging as getting them in the first place.

We partnered with Code for America to develop a plan to improve the system for automatically renewing Medicaid benefits in Pennsylvania. Automatic renewals rely on existing data sources to redetermine eligibility — removing the application burden on beneficiaries

and saving staff time. We invested in improvements to streamline benefits statewide, not just person-by-person.

AARP Foundation's one-time investment in improvements to Pennsylvania's enrollment system could lead to tens of thousands more Medicaid beneficiaries being automatically renewed each year, and tens of millions of dollars in annual benefits secured.



Expanding Access to Financial Relief

AARP Foundation Paid4Care™

The average family caregiver spends 24 hours a week providing care. That's the equivalent of a part-time job.⁴ So it's no surprise that a top search on AARP's website asks: "Can I get paid for the care I provide?" In 2024, with support from UnitedHealthcare, AARP Foundation built a digital resource center to help answer this question.

AARP Foundation Paid4Care guides caregivers through the patchwork of programs that exist through Medicaid or Veterans Affairs to pay caregivers — and it connects them with relevant programs in their states. In the first six months, the site received half a million visits.

Caregivers who have used the site say they appreciate how it makes a complex and bureaucratic set of local programs understandable and relevant to them.

They have all the information that you need. I'm just amazed by this, because I spent four years trying to figure this out."

45-year-old family caregiver in Ohio

The site led me directly to where I could inquire about assistance in my town."

67-year-old Property Tax-Aide website user in New York state

AARP Foundation Property Tax-Aide

Rising property taxes are a source of financial stress for many older homeowners. Property tax relief, such as refunds and credits, are available in nearly every state and the District of Columbia, but many older adults don't know about them. Historically, AARP Foundation volunteers working in a handful of states helped people apply.

In 2024, we dramatically expanded access to property tax relief by launching an online resource center that simplifies the process of identifying and applying from any part of the country. In 2024, 32,579 people completed an eligibility screener on the Property Tax-Aide website and were connected to relevant programs in their local area. In a follow-up survey, more than 80 percent of eligible older adults with low income said they had submitted an application to a program after they had visited the site or said they planned to apply for property tax relief.

Empowering Pathways Back To Work



Our employment programs worked with

62,646

older adults with low income

We helped older adults with low income secure

\$149.3 million

in new income

Half the workforce now expects to work past 65.⁵ But those with the least resources face the greatest obstacles to working longer: only one-third of low-wage workers remain continuously employed through their 50s. Many are sidelined by layoffs, health problems or family caregiving duties.⁶ Once out of work, older jobseekers are far more likely than younger job seekers to face long-term unemployment.⁷

AARP Foundation is a national leader in workforce training for older adults. In 2024, we increased the number of people we served through job coaching so they could build the skills and confidence they need to find pathways back to work. And we introduced new training opportunities for older adults online, including a national workshop for those who want to start their own businesses.



Senior Community Service Employment Program (SCSEP)

AARP Foundation is one of the largest administrators of SCSEP, a US Department of Labor–funded program that matches unemployed older adults with paid training opportunities. By connecting them with local nonprofits and public agencies, SCSEP empowers jobseekers who are 55 or older and have low income to reenter the workforce with new skills and confidence.

In 2024, program participants took advantage of the tight labor market and finished the program in 15 months on average, entering the workforce three months faster than in 2023. They also earned 12 percent more, with the average starting wage for post-SCSEP employment growing to \$15 an hour.

Participants entered the workforce three months faster than in 2023 and earned 12% more.

BACK TO WORK 50+

BACK TO WORK 50+ provides older adults with resources and career coaching so they can compete for good jobs. Through virtual and in-person programs, we connect jobseekers to the skills and strategies they need to get hired. A supportive coach and a community of peers build their self-assurance and ensure they do not have to navigate the process alone.

In 2024, a total of 23,754 older adults with low income accessed our resources or attended a workshop to learn proven strategies for finding employment and build confidence.

More than 2,800 of those jobseekers received career coaching virtually or in person, an increase of 68 percent from 2023. And of those who participated in coaching, 723 shared with AARP Foundation that they found new jobs.

68% more program participants received career coaching, compared to 2023.



Harold St. John

Participant

"The program gave me the process, the people and the tools I needed to meet my goals."

Harold St. John, a 63-year-old IT delivery manager, was laid off in January 2024. An experienced professional with a strong network, he thought his search would be easy. Instead, it dragged on for months. With his savings nearly exhausted and on the verge of losing his home, he joined AARP Foundation's BACK TO WORK 50+ program.

With support from a program coach, he refined his résumé from three pages going back 40 years to two pages that focused on 10 years and highlighted

transferable skills. He learned to evaluate job postings carefully to make sure they fit his abilities. And he treated his search like it was a full-time job, working every weekday from 8 in the morning until 2 in the afternoon. With encouragement from fellow job seekers who kept him motivated, Harold persevered and secured a senior position in the digital music industry with a higher-than-expected salary just before his unemployment benefits expired, allowing him to keep his house and regain financial stability.

Work for Yourself@50+

Workers over 50 are more likely than younger workers to be self-employed, advantage of the flexibility and independence that come from being their own boss. AARP Foundation offers online workshops, coaching and other resources to help aspiring entrepreneurs, small business owners and freelancers.

In 2024, we significantly increased the number of older adults who accessed our resources and support. And we launched a national workshop introducing Five Simple Steps to Starting a Small Business. This virtual program builds on

in-person programs we offer through partner organizations in 21 states. Now anyone, anywhere can participate in either English or Spanish. We also added a recurring online coffee chat, where older adults can learn more about freelancing and how it can help them generate income.

The national digital service delivery model allowed us to increase the number of people our programs reach. In 2024, we served 26,192 older adults with low income, representing a 56 percent increase compared to 2023.

72% of participants surveyed said the toolkit and workshop helped them decide to go ahead and start or expand their businesses.

Most respondents said these resources gave them the direction and the information they needed to move forward.



The Power of Volunteers



In 2024, we grew our volunteer network to

29,055

a 6% increase from 2023

AARP Foundation has been working with volunteers for 60 years to power community-based programs that reduce poverty. In 2024, our national volunteer network grew to more than 29,000 older adults who made a sustained commitment to tutoring children or to helping people file their taxes. With this growing volunteer base, we increased the number of taxpayers we served, and we piloted a new model for connecting volunteers to schools virtually.

Older adult volunteers are a powerful force driving social change. People over 50 account for one-third of the population but 44 percent of all volunteers nationwide. And they spend more time volunteering: for every hour a younger volunteer serves, an older volunteer devotes an hour and a half.

This remarkable commitment doesn't just make a difference in communities; it also brings rewards to the volunteers themselves. Through volunteering, they find a sense of purpose and opportunities for meaningful social connection. It's an exchange that benefits everyone.

The typical refund came to \$904 – more than enough to cover a year's worth of water bills for an average household.11

AARP Foundation Tax-Aide

AARP Foundation Tax-Aide, funded in part by the IRS, is the nation's largest free volunteer-based tax assistance and preparation program, operating in 3,600 communities across every state and the District of Columbia. IRS-certified volunteers reached nearly 1 million older adults with low income in 2024. They brought in refunds and credits totaling more than \$625 million.

Tax refunds can improve credit scores for people with low income and alleviate the persistent financial stress that many older adults feel. 10

Our work helped older adults with low income save an average of \$242.30 each in tax preparation fees – enough to cover the average cost of Medicare prescription drug premiums for a year.¹¹

998,837

older adults with low income were served by Tax-Aide and our grantees

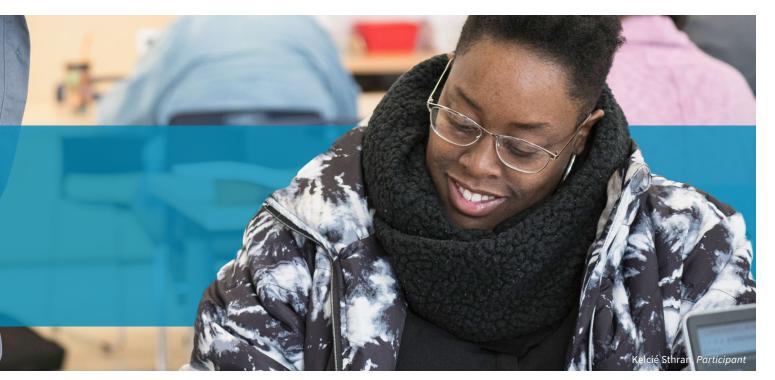
Up 9% from 2023

Tax-Aide and our grantees brought in

\$625 million

in refunds

Up 11% from 2023





and Elizabeth

Volunteer and Participant

"He's my guardian angel."

When Elizabeth Seaver, an 83-year-old retired music teacher, received a letter from the IRS claiming she owed over \$10,000 in additional taxes, she was surprised — and confused. She sent a check for the full amount but also called to report the issue to AARP Foundation Tax-Aide, where she had prepared her taxes. Volunteer Harv Grassian got her message and remembered her.

Harv met Elizabeth to review her documents. He confirmed the return had been filed properly, so he prepared a detailed response to the government with supporting evidence and requested a refund. Thanks to his diligence, Elizabeth eventually recovered the full \$10,000 plus interest. She left Harv a voicemail to thank him.

"He's my guardian angel," Elizabeth says of Harv, who has been volunteering since 2011 and is still doing Elizabeth's taxes. He enjoys replaying her voicemail to remind himself why he continues volunteering after all these years.



AARP Foundation Experience Corps

Children who can't read at grade level by fourth grade are four times less likely to graduate from high school by age 19, putting them on a path to poverty later in life. ¹² AARP Foundation Experience Corps volunteers are helping turn that statistic around by tutoring elementary students in reading.

In schools that participated in Experience Corps in the 2023-2024 school year, 98% of school staff surveyed were satisfied with their students' progress in reading ability, critical thinking skills and socialemotional skills.



Ja'Nice Little, Volunteer

We expanded the reach of this volunteer opportunity in 2024 by offering virtual tutoring in some schools, opening the door for those with mobility challenges or those living in other communities.

Ja'Nice Little, a retired preschool teacher, could not find a volunteer tutoring program in her small town of Haydon, Idaho, so she signed up to tutor online with Experience Corps. Two mornings a week, she logs in to read with a third-grade student in Carson, California.

"It feels like you are there. You are that close, and you really develop a rapport with that child," she says.



Justice for Older Adults

"We transform individual struggles into collective impact."



William Alvarado Rivera SVP, Litigation



Older adults routinely experience discrimination, financial exploitation and threats to their independence simply because of their age.¹³ AARP Foundation attorneys dismantle systemic barriers and create pathways to justice for older adults, ensuring they have a voice in the legal system.

Through class action lawsuits, AARP Foundation creates collective power that improves systems for everyone. Working with older adults, we filed an age discrimination lawsuit in 2024 against RTX Corporation (formerly Raytheon Technologies), a major defense contractor. We also secured relief for thousands of pensioners whose retirement funds were misappropriated by their former church employer. And we won a long legal battle to empower older adults with disabilities to age in place, rather than be relegated to unnecessary institutionalization.

Highlights

Safeguarding retirement funds

AARP Foundation attorneys represented a class of 5,000 employees and retirees from the African Methodist Episcopal Church (AME) whose pensions were mishandled and their hard-earned savings lost.



In 2024, the church agreed to a \$20 million settlement. The agreement provided immediate restoration of some funds and created a pathway to restore the rest. Church pension plans fall outside federal regulations that protect against fraud or mismanagement. This case puts all employers on notice that they have legal and fiduciary obligations to their employees.

"When I asked for my retirement funds, I actually needed them and they weren't available... It was a great relief knowing I had an advocate."

Rev. Cedric Alexander, Lead Plaintiff

Protecting the right to live in community

Over three decades, care for Americans with disabilities has shifted from institutional settings toward community-based support, a transition accelerated by a 1999 Supreme Court ruling mandating state-funded services in the "most integrated settings" possible.

Despite this shift, many Medicaid-funded nursing homes have continued to institutionalize people with disabilities. In December 2024, after 14 years of litigation by AARP Foundation, a federal judge found the District of Columbia liable for failing to provide services to nursing facility residents with disabilities so they could return to their homes. AARP Foundation built the case from working with a generation of older adults who were unwillingly confined in facilities.

The groundbreaking decision impacts the lives of approximately 5,000 District residents and sets a powerful legal precedent for jurisdictions nationwide.

Taking on age discrimination in hiring

AARP Foundation filed a class action lawsuit against RTX Corporation, formerly Raytheon Technologies, challenging hiring practices that systematically exclude qualified older workers. When lead plaintiff Mark Goldstein, 67, applied for a job, he met many of the qualifications, but he was not a "recent graduate" as the job listing specified.

This case spotlights a pervasive national problem affecting older jobseekers. Research by AARP and the Burning Glass Institute identified one million job postings in 2022 using exclusionary terms like "digital native" and "recent graduate." ¹⁴

Through strategic litigation and national media coverage, we're building momentum to dismantle age barriers in employment, advancing our mission to ensure all older adults can age with dignity, financial security and equal opportunity in the workplace.

"I had all the requirements that they listed in terms of skills and experience. But the one thing that I couldn't do was to be a recent college graduate."

Mark Goldstein, Lead Plaintiff

When Disaster Strikes: Connecting Communities to Hope



We distributed

\$1.5 million

in emergency grants

In the fall of 2024, Hurricanes Helene and Milton carved a devastating path through the Carolinas, Florida, Georgia and Virginia. Thanks to the generous support of AARP Foundation donors and matching funds from AARP, we distributed \$1.5 million in emergency grants to provide immediate relief and build a strong foundation for recovery. The organizations we supported were:

- Senior Friendship Centers (Florida)
- Taylor County Senior Citizens Center (Florida)
- Pinellas Community Foundation (Florida)
- United Way of Southwest Virginia
- Golden Harvest Food Bank (Georgia)
- Spartanburg County Foundation (South Carolina)
- North Carolina Association of Area Agencies on Aging
- Beloved Asheville (North Carolina)
- Asheville Area Habitat for Humanity (North Carolina)
- Pisgah Legal Services (North Carolina)
- SBP (Florida, Georgia, South Carolina and North Carolina)

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Thank you for believing in AARP Foundation's mission to reduce poverty for and with older adults. Your generous support is empowering seniors to live with dignity and independence.

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United States Department of Justice

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The AARP Foundation Opportunity Builders are generous and committed leaders who sustain our vision and our mission. These donors power the work we do with their annual gifts of \$1,000 or more. Their philanthropic gifts allow us to serve as a force for change on the most serious issues faced by seniors living in or near poverty. We thank the following individuals for their generosity and support of AARP Foundation.

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Terri Thompson Peter Thorp

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Susan Tisdale
Kimberly Tobin
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Eleanor Tomlinson

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J. Trevas Tamara Trimble Ethel Tsausis

David Tucker Corbin Tudor

Robert Turner Cynthia Tysinger

Erica Ueland
Kathryn Uhl
Marc Ullrich
Joel Umlas
Edwardo Valdivia
Thomas A. Van
Robert Vanderhoof
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2024 Legacy Society

The AARP Foundation Legacy Society recognizes individuals who include AARP Foundation in their wills or living trusts; name the Foundation as a beneficiary of a retirement plan, commercial annuity, or life insurance plan; or make an irrevocable life income gift, such as a charitable gift annuity or charitable remainder trust. These exceptional gifts perpetuate the legacy of caring established by AARP's founder, Dr. Ethel Percy Andrus, and allow us to serve as a force for change on the most serious issues faced by seniors living in or near poverty.

The names listed below are those AARP Foundation Legacy Society members who have confirmed both their gift commitments and their willingness to have their names published. On behalf of the people we serve, AARP Foundation offers them our heartfelt thanks.

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Thomas Andrews
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Irene Arrington
Werner Arrivillaga
Phyllis Arzate
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Marcella Taylor
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Peter Wylie
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John Zerance

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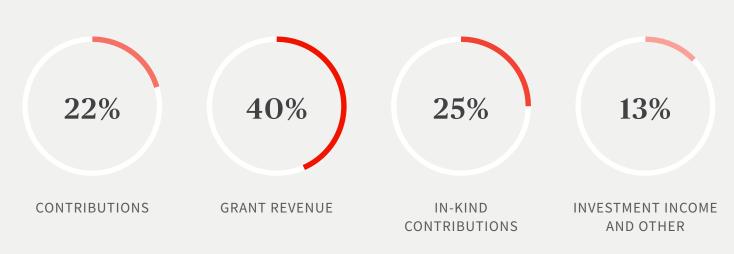
Financials

This summary of financial information has been extracted from the AARP Foundation audited financial statements as of December 31, 2024, and December 31, 2023, on which an independent public accounting firm expressed an unmodified opinion.

SOURCES AND USES OF FUNDS

AARP Foundation receives funding from multiple sources, including public support, grants and AARP. Eighty cents of every dollar the Foundation spends goes to our important programs and services to improve the quality of life for vulnerable older adults in your community and across the country.





FUNCTIONAL EXPENSES



STATEMENTS OF FINANCIAL POSITION As of December 31, 2024, and December 31, 2023 (in thousands)

ASSETS	2024	2023
Cash and cash equivalents	11,264	10,098
Contributions receivable, net	712	1,345
Grants receivable	15,210	12,040
Prepaid expenses and other assets	915	972
Investments	681,532	650,652
Charitable gift annuity investments	4,663	5,476
Program-related investments, net	3,661	3,500
Property and equipment, net	9,930	9,196
Total Assets	727,887	693,279
LIABILITIES	2024	2023
Accounts payable and accrued expenses	26,905	25,593
Due to affiliates	134	4,196
Charitable gift annuities payable	2,724	2,897
Bonds payable	25,000	25,000
Total Liabilities	54,763	57,686
NET ASSETS	2024	2023
Net assets without donor restrictions:		
Undesignated	80,148	65,705
Board-designated quasi-endowment	31,452	29,434
Board-designated operating reserves	62,068	64,460
Total net assets without donor restrictions:	173,668	159,599
Net assets with donor restrictions	499,456	475,994
Total Net Assets	673,124	635,593
Total Liabilities and Net Assets	727,887	693,279

OPERATING REVENUE	2024	2023
Grant revenue	104,036	102,136
Contributions	57,666	57,800
In-kind contributions	65,369	62,689
Investment income designated for operations	30,852	28,941
Other	403	841
Total Operating Revenue	258,326	252,407
EXPENSES	2024	2023
Program Services:		
Economic Mobility	137,359	132,325
Volunteer Programs	25,072	24,920
Financial Wellbeing	9,486	8,005
Legal Advocacy	7,894	7,371
Other programs	21,846	22,423
Total Program Services	201,657	195,044
Supporting Services:		
Fundraising	29,671	30,552
Management and general	24,872	25,743
Total Supporting Services	54,543	56,295
Total Expenses	256,200	251,339
Changes in Net Assets from Operations	2,126	1,068
OTHER CHANGES IN NET ASSETS	2024	2023
Investments (loss) return in excess of amounts designated for operations	35,367	32,082
Changes in value of charitable gift annuities	38	24
Change in Net Assets	37,531	33,174
Net Assets, Beginning of Year	635,593	602,419
Net Assets, End of Year	673,124	635,593

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playbook-for-the-inclusive-hiring-of-later-career-workers.



About AARP Foundation

AARP Foundation works for and with older adults to increase economic opportunity by creating pathways to work, expanding access to financial support, mobilizing volunteer-driven community service, and advancing legal advocacy so that everyone can age with dignity and purpose. The Foundation is a charitable affiliate of AARP.

