

THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

Gifts in the Attic

During the entire holiday season – Thanksgiving, Christmas and the New Year – our thoughts often turn to how we can brighten the days of people served by our favorite charitable organizations. And while those organizations, including The Catholic Foundation, always welcome cash gifts, it's good to keep in mind there are other ways to give that can benefit not only your favorite causes but also suit your own financial plans.

In the last 25 years, the Foundation has awarded over \$70 million in grants to the Catholic community. Staff members have the expertise to help you and your financial advisors brainstorm ways to give, including some that do not involve pulling out your checkbook. Whether charitable giving is part of your holiday plans or you want to think ahead to 2012, are there gifts in your attic you haven't thought about? Consider the following:

- An existing *whole life insurance policy* can be a generous way to give when the donor simply

irrevocably assigns his or her insurance policy to The Catholic Foundation and names the Foundation as the beneficiary. Donors receive tax deductions equivalent to the lesser of the fair market value or cash basis of the policy, or for the amounts contributed to the Foundation to pay premiums. Proceeds from the life insurance may even be used to establish a charitable fund or permanent endowment.

- A *life estate* is created when a donor makes a charitable gift of a primary residence or second home. The donor realizes a current income tax deduction and continues to live in the home until his or her death, at which time the Foundation sells the home and uses the proceeds to support the charitable purposes specified by the donor or adds the funds to its Unrestricted Endowment Fund.
- A gift of *appreciated assets*, such as real estate or securities, can benefit both the donor and the charitable organization. By donating assets held longer than a year, the charity receives the full



value of the gift, and the donor claims the tax deduction for the full amount and at the same time avoids having to pay capital gains tax. Giving appreciated assets takes a little longer than simply writing a check, so please be sure to contact The Catholic Foundation *before* you sell the assets, and allow plenty of time to transfer them.

To learn more about how The Catholic Foundation can work with your own tax or financial advisors to create a plan to meet your objectives, please call us at 972-661-9792.

THE PRESIDENT'S LETTER



If you follow the news these days you may think that the old adage "Let's look at the good side of things" no longer applies because they seem hard to find. The last year or so has been filled with challenging news. At times like this I believe it is more important than ever to focus on the good things happening around us and appreciate the good people who are making them happen.

The world of The Catholic Foundation is filled with good people doing good things. Almost every day I see generous people come forward to make good things happen. I see the results of volunteers building a much-needed playground or garden to improve one of our schools or parishes that has the need but not the resources. It was a pleasure to assist a Foundation donor who wanted to purchase new textbooks for one of the Catholic schools

because the donor knew the books were needed. The sound of new English books cracking open for the first time was fun to hear. And one of the best symbols of good things happening was the dedication of the new church at St. Cecilia.

All we have to do is look around us to see that 2011 was a good year filled with good works. We can do great things when we come together to make them happen. Our wish for the new year is that The Catholic Foundation will continue to help make good things happen throughout our great Catholic community, and that you will join us in doing it.

Have a happy and prosperous New Year!

Edwin M. Schaffler

EDWIN M. SCHAFFLER

A Strong FOUNDATION

IN MEMORIAM:



Charles "Corky" Clark

Charles "Corky" Clark Jr., a former trustee of The Catholic Foundation who served as chairman from 1995 to 1997, passed away in late August. He left a legacy as a prominent businessman, civic leader and volunteer in many Catholic organizations.

A native Dallasite, Corky graduated from Jesuit College Preparatory and the University of Notre Dame. In 1963, he joined Olmsted-Kirk Paper Co. and retired in 2006 after serving as president and CEO of the company as well as in leadership positions in industry organizations.

Corky served as president of the Salesmanship Club of Dallas and on various boards throughout our community.

A member of Christ the King Parish, he served on boards at the University of Dallas and at Holy Trinity Catholic School. He was a member of the Serra Club, the Knights of the Holy Sepulchre and Knights of the Sovereign Military Order of Malta. Jesuit Preparatory School presented him its Distinguished Alumnus Award in 1999 and the Alumni Lettermen's Club "Gold Ranger" Award in 2006. In 2000 Corky received the Notre Dame Club of Dallas Person of the Year Award in recognition of his service to the community. Ed Schaffler, president and CEO of The Catholic Foundation, remembers Corky on a professional and personal level. "Along with everyone on the staff of the Foundation, I appreciate Corky for his service to our organization and the Catholic community as a whole. As chairman of the board he gave me an opportunity to work for the Foundation, and I am especially grateful for that."

Charles Gummer



Charles L. Gummer, a prominent banker and community volunteer in Dallas, has concluded six years as a member of the Board of Trustees of The Catholic Foundation.

Gummer, who also recently retired as chairman of the Comerica Bank-Texas Market, served on the Foundation's Distribution, Audit and Administration, and Development Committees.

"The demands on his time were tremendous, but he gave so much to his work with The Catholic Foundation," says Tom Merkel, board chairman. "I always regarded Chuck as one of the most thoughtful members of the board, and his service was exemplary. In reviewing grant applications and making site visits, he looked at an organization's place in the community with a universal view, always focusing on what was right for the parish or school."

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John Kraft Award/Plano Chamber of Commerce



John R. Kraft, a member of The Catholic Foundation Board of Trustees since 2010, was recently named Small Business Person

of the Year by the Plano Chamber of Commerce. The award recognizes small business owners who have exhibited exemplary leadership, business growth and service to the community.

Owner of the Kraft State Farm Agency in Plano, he is a chartered financial consultant and chartered life underwriter. His experience in business and service to the community is a valuable tool to the Foundation's Distribution and Development Committees on which he serves.

NEW WEBSITE



Visitors to The Catholic Foundation's website are noticing something new. The redesigned site is more user-friendly as friends and donors increasingly turn to the website to learn more about the Foundation, explore ways to give, apply for grants and even transact business.

The site format is designed for a larger screen, allowing for larger type. Improved navigation includes a menu bar on the top for more control and less scrolling. The site boasts more, and larger, photos for greater visual appeal.

For the first time, visitors can register for events by using the "event reservation" button in the top right corner. Facebook and Twitter logos offer access to the Foundation's Twitter feeds and Facebook page.

"We're trying to create a better experience for the visitor to our site," said Michael George, senior development officer of The Catholic Foundation. "It's easier to navigate, easier to read and more interesting to look at."

To check out the new site, please visit www.catholicfoundation.com.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

CHARITABLE GIFT ANNUITIES

In considering your estate plan, it isn't always necessary to choose between providing for your own needs in retirement and supporting the charitable organization of your choice. When the objective is both income for the future and supporting a favorite cause, many individuals turn to charitable gift annuities.

Considered a category of planned giving, a charitable gift annuity is a contract between a donor and The Catholic Foundation. The donor transfers cash, marketable securities or another valuable asset to the Foundation in return for a partial tax deduction and a

lifetime stream of annual income from The Catholic Foundation.

Charitable gift annuities offer flexibility to philanthropically minded individuals, typically seniors who desire a stable level of income. In the contract, the Foundation agrees to pay a fixed sum of money for a period measured by one or two lives. For example, a husband and wife can establish a "joint and survivor" charitable gift annuity, which will provide annual income as long as at least one of them survives.

The donor can begin receiving the income immediately or defer payments until reaching a certain age. The donor realizes significant tax advantages — an immediate charitable tax deduction and a portion of the

stream of income payments as a tax-free return of principal.

Income from a charitable gift annuity is fixed from the beginning and is not affected by changes in interest rates or the stock market. The size of the payments depends on several factors:

- The number and age(s) of the annuitants;
- The rate – The Catholic Foundation uses rates recommended by the American Council on Gift Annuities; and
- The size of the charitable gift.

To learn more about charitable gift annuities and how The Catholic Foundation can help you create an estate plan that meets your objectives, please call us at 972-661-9792.

DONOR PROFILE:

Denis and Denise Simon

For Denis and Denise Simon, becoming donors to The Catholic Foundation was simply an outgrowth of their life in a close-knit church community – All Saints Catholic Church in Dallas, where Denis serves as a deacon.

Through their donor-advised fund, they enjoy the convenience of giving through The Catholic Foundation. Grant recommendations from the Simons have supported organizations such as Our Lady of Perpetual Help, Catholic Charities, All Saints Catholic Church, as well as Denis' alma mater, Ohio State University, and Denise's, Miami University in Ohio.

Additionally, the Simons have established a deferred charitable gift annuity, becoming members of the Foundation's Legacy Circle, which recognizes those with planned gifts. Denis also is a member of the Foundation's Advisory Council.

Originally from Ohio, Denis moved to Texas in 1978 while in the Army, and never looked back. Twenty-five years ago, he went to work for Challenger, Gray & Christmas, Inc., one of the nation's most prominent outplacement consulting firms, where he now serves as senior executive vice president, overseeing the southern half of the United States.

Denise, a native New Yorker was an "Army brat" who attended seven Catholic elementary schools in eight years. At All Saints, she served as president of the Women's Club and was founder of the Mom's Day Out program. Denise also served on the school board of Our Lady of Perpetual Help.

With five children – Matthew, Mark, Luke, John and Mary – Denise kept busy volunteering in various schools over the years. All but Luke are in the Dallas area, and the Simons enjoy spending time with their six grandchildren. Denise describes herself as a "self-taught artist" and recently launched a jewelry-design business called Blessed5X (Blessed Five Times), named for what she describes as her crowning achievement, the couple's children. "I have

been blessed five times by five wonderful children who are now all successful young adults on their own," she says. "Now I plan to celebrate their lives and enjoy my own success!"



Denis and Denise Simon

A LIGHT On

Nineteen Dallas-area Catholic schools and other organizations will receive support from The Catholic Foundation this fall to expand programs, renovate or construct facilities, replace equipment, and assist students with tuition, with \$869,149 in grants announced November 22.

The grants were made from the Foundation's Unrestricted Endowment Fund and from funds designated for support of religious, educational and charitable programs and associations in the Diocese of Dallas. They were made possible by gifts from Foundation donors, past and present, in support of the mission – to promote compassionate charitable giving that serves the needs of the entire Catholic community.

Meeting twice a year, the Distribution Committee of the Board of Trustees reviews grant applications and recommends that grants be awarded to those agencies and organizations that have pressing needs or projects that serve the physical and spiritual needs of the Catholic community.



Kids Eat Free — Christian Community Action, St. Ann Catholic Church, Coppell

Several grants will help local organizations pursue their mission of serving the poor and elderly. A grant to Catholic Charities will help provide emergency aid to veterans and the elderly poor. Christian Community Action in partnership with the youth ministry of St. Ann Catholic Church in Coppell will use its grant for the “Kids Eat Free” lunch program in the summer of 2012.



Children's Education Fund

Other grants will help Catholic schools and organizations construct or renovate facilities. Holy Cross Catholic Church will repair the roof and install new doors at Thea Bowman Hall, Immaculate Conception Church in Corsicana will refinish pews and replace kneelers and the floor covering in the sanctuary, and Holy Spirit Catholic Church in Duncanville will replace HVAC units in the gymnasium.

Immaculate Conception Church and School in Grand Prairie will install new HVAC units in its convent and portable classrooms, Sacred Heart Catholic Church in Rowlett will repair the roof and walls of its multi-purpose building. St. Cecilia Catholic Church will use its grant toward construction of a new church, St. Patrick Catholic Church will replace pews, and presider and choir chairs, St. Vincent de Paul Thrift Store will repair its roof, and St. Joseph's Residence, a retirement home for the elderly in Oak Cliff, will complete a new residential wing.

Other grants will help Bishop Dunne Catholic School replace boilers, Notre Dame School purchase a new seven-passenger van, and St. James Catholic Church install new kitchen equipment in Parish Hall.

Still other awards will support Catholic education by enriching curriculum or enabling students to attend schools. Big Thought, which seeks to stimulate imagination and creativity, will use its grant to enrich programming in five Diocesan schools, and the Museum of Nature & Science will support science programs in 16 Diocesan schools. A grant to the Zero to Five

Funders' Collaborative will support Catholic Charities “Together We Learn” Program, which promotes literacy and helps parents interact with their children to foster communication and language development.

A grant to the Children's Education Fund will help provide tuition assistance for children in grades K-8 attending Catholic schools, while another grant will provide scholarships to students in Catholic high schools.

“These most recent grants continue The Catholic Foundation's tradition of supporting worthy organizations that meet vital needs in our community,” says Ed Schaffler, president and CEO of The Catholic Foundation. “We are grateful to the many generous donors for making these awards possible.”



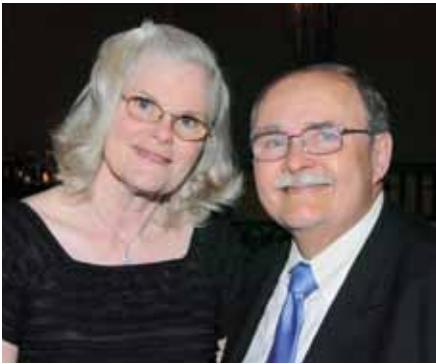
St. Cecilia Catholic Church

Facebook & Twitter

You can find The Catholic Foundation all over the Diocese these days, supporting our donors and meeting community needs. And now, you can find us on Facebook and Twitter! We want you to stay updated on events, grants and other Foundation happenings through our new social media presence. We hope you will take a moment to support our presence on Facebook and Twitter.



"Dallas in Wonderland," a collage by Rebecca Guy, is now on display in The Catholic Foundation Plaza in the Dallas Arts District on the grounds of the historic Cathedral Shrine of the Virgin of Guadalupe, at the corner of Crockett and Flora streets. Winning artists are selected by a panel of respected members of the local arts community. The Plaza was funded by a gift from The Catholic Foundation in celebration of its 50th anniversary six years ago. To view the winning artwork as well as all entries submitted, please visit the Foundation's website at www.catholicfoundation.com.



RUBYS HEAD DINNER COMMITTEE

With the able leadership of co-chairs Len and Peggy Ruby and the backing of an enthusiastic 76-member volunteer committee, The Catholic Foundation's 2012 Annual Awards Dinner is shaping up to be one of the best ever.

The event, which will honor Sister Margaret Ann Moser, O.S.U., retiring president of Ursuline Academy of Dallas, is scheduled for Friday, February 10, at the InterContinental Dallas.

The annual dinner celebrates the work of the Foundation and the generous philanthropists who support the missions of Catholic organizations throughout the Diocese.

Committee members include Miriam Ackels, Mary Emma Ackels-Karam, Colleen and Robert Baillargeon, Cindy and Kevin Bartholomew, Alan Bell, Win Bell, Linda and Dale Booth, Dr. Al Cardenas, Raymond Chavez, Thomas Codd, Joseph Coleman, Lou Ann and Michael Corboy, Bill Dahlstrom, Mary Lee and Fritz Duda, Dan Flaherty, Carlos Fonts, Christy Frazer, Robert Galecke, Jennifer Gates, and Susan Genovese.

And Peggy Haden, Maureen and Joe Hafertepe, Jane and Don Hanratty, Vince Hess, Dot and Roger Hirl, Kasey and William Hollon, Jan and Thomas Hopkins, Albert Hrubetz, G. Charles Kobdich, John Kraft, Vicky Lattner, Ann Letteer, Norma Longwell, Michael Maguire, Charles (Chick) H. Martin, Nancy and Patrick McLochlin, Deacon Brian Mitchell, Brenda and Robert Morgan, Margot Murphy, and Kathy and Matthew Nevitt.

Also Lydia Novakov, Pat and Neil O'Brien, Jon Piot, Nancy Poinatte, Jane and James Ryan, Mary and Allen Schaar, Jane Schaffler, Deacon Denis Simon, Mary Templeton, Mary and Mike Terry, Wendy Traylor, Eugene Vilfordi, Angie and Bill Wallander, James Walsh, Laura Fox Williamson, Mark Wischmeyer, David Woodyard, and Ana and James Yoder.

Legacy Circle

This year's Legacy Circle Dinner was held on November 1st, which was also All Saints Day. The Catholic Foundation Legacy Circle honors individuals who have made long-term commitments to the Foundation through planned gifts such as bequests, permanent endowments or charitable trusts.

1. Lorraine and John Gurun
2. Mark Wischmeyer, Charles Phipps, Jennifer Gates, John Grimes
3. Art and Katie Bissonnette, Monsignor Thomas Weinzapfel, Mary Agnes Gilbert
4. Rita and Joe Hogan



1.



2.



3.



4.

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The Good Word

The Good Word is published to provide news and information about The Catholic Foundation's activities and programs. Any questions or comments should be sent to:

The Catholic Foundation
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or faxed to 972-661-0140.

For additional information regarding the Foundation, please call 972-661-9792 or refer to: www.catholicfoundation.com



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