

THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

The Foundation Makes Planned Giving More Accessible for Catholic Organizations



St. Patrick Catholic Church in Denison, a participant in the Parish Endowment Program at The Catholic Foundation, displays its new exterior donor collage.

In a new initiative, The Catholic Foundation plans to reach out to every Catholic parish, school and organization in the Diocese of Dallas over the next four years and provide them with the necessary tools to implement their own long-term giving programs.

This type of program has been an important part of development efforts at community foundations and larger nonprofits for hundreds of years, but it is still underutilized by organizations within our Catholic community. "Our organizations are outstanding at executing both annual giving programs and

capital campaigns, but in many cases they are not as familiar with asking for end-of-life gifts," says Foundation Senior Development Officer Michael George.

The most common barriers for many organizations is a perceived lack of staff or expertise, but simple steps can be taken to make these programs more accessible. Most people are familiar with bequests, life insurance and retirement accounts because they already utilize these tools to help their families. These types of assets comprise more than 90 percent of all estate gifts. If a church, school or organization has a close enough bond with someone, it is natural to ask them to consider treating their charitable intentions as they would a family member.

In addition to providing the tools necessary to establish their own legacy giving programs, the Foundation will also lend their expertise to organizations about more complex gifts, as well as the opportunity to establish an endowment fund at The Catholic Foundation.

Because most Catholic organizations have websites, newsletters, annual reports and other marketing materials, putting a simple message in each communication vehicle about a gift

from an individual's estate can be as simple as saying "Please remember our parish in your will." Spending a lot of money to make people aware of these opportunities is not necessary.

While having consistent messaging in existing materials is important, the most critical aspects of a good end-of-life giving program are the stewardship, recognition and appreciation of the blessings provided by those who have already made these gifts or have notified the organization of their intentions. That is why it is recommended that each institution have a Legacy Society to recognize donors who have made a long-term commitment to the institution.

"Thanking our parishioners appropriately and in a permanent way for the blessings they have bestowed upon St. Joseph helps families stay connected with our parish even after they are gone," says St. Joseph Catholic Church of Richardson, Texas pastor Father Jason Cargo. "Our St. Joseph Legacy Society will be an integral part of our stewardship efforts for years to come."

For more information on this program, please contact Cheryl Unis Mansour, Michael George or Mike Murray at the Foundation at 972-661-9792. 🐣



THE PRESIDENT'S LETTER

Sixty years of giving, 60 years of impact, 60 years of stewardship. We would not be here today without the generosity of all the donors who have given to The Catholic Foundation throughout the years – those who left permanent endowments at The Catholic Foundation; donors who currently give through

the Foundation to their favorite charities; and those who have entrusted us to carry out their charitable intentions in their wills.

We finished 2015 with more than \$223 million in assets under management. Contributions to The Catholic Foundation last year,

without capital campaigns, increased to more than \$12.4 million. Grants made by the Foundation have grown from \$4.7 million in 2012 to more than \$15 million in 2015! Last year we made more than 1,300 grants to more than 505 unique organizations here in the Dallas area and across the United States. Cumulative grants from the past 40 years exceeded \$100 million in 2015!

For our donors, we appreciate your confidence in The Catholic Foundation to serve you and carry out your charitable intentions. For those of you interested to learn how The Catholic Foundation can assist you with your charitable giving, call us or stop by and visit us!

J. MATTHEW KRAMER

A Strong FOUNDATION

IN MEMORIAM: Eugene Vilfordi



Gene Vilfordi at the 2013 Legacy Circle Dinner for Donors.

The Catholic Foundation and the Dallas Catholic community mourn the loss of a very dear friend, Eugene Emile Vilfordi. Gene played a significant role in the early developmental years of The Catholic Foundation. Not only are Gene and his wife Shirley donors, he was on the Foundation Board of Trustees for 19 years and served on the Investment Committee and the Distribution Committee. Gene worked at Merrill Lynch for 51 years, becoming one of the longest tenured employees in Merrill Lynch history, before he retired in 2004.

Despite his numerous professional accomplishments, Gene's focus was always being a devoted father of three, husband, grandfather, mentor, leader and philanthropist. He cherished traveling with his family and loved spending time with them, especially his four grandchildren.

After 27 years of marriage to his first wife, Ruth, and her subsequent death to cancer, Gene met Shirley Smith at 6:25 a.m. Mass at St. Rita Catholic Church in Dallas. He and Shirley were married on January 28, 1984, and continued as parishioners for 48 and 36 years respectively. It was no surprise that Gene's funeral services filled St. Rita's church to capacity on March 29th, 2016, with many admirers who loved him dearly.

Over the course of his lifetime, Gene received countless awards and recognitions from organizations to which he contributed his time and many talents including National Catholic Educational Association, Jesuit, Cistercian, Ursuline, St. Rita Catholic Church, the University of Dallas, Merrill Lynch, Serra Club and, of course, The Catholic Foundation to name a few.

Shirley and Gene rarely missed a Catholic Foundation event including the most recent February 2016 Awards Dinner. Because Gene, a talented writer and public speaker, kept a written record of all of his musings, speeches, poems and short stories, we have the privilege

of sharing an excerpt from his acceptance speech when he received the "exemplary Catholic leader" McGill Award (now called The Catholic Foundation Award) in 2000.

"This is the 18th McGill Award Banquet and I am proud to say that I have attended every one of them. It is hard for me to put into words the gratitude I have for the 19 years I served as a trustee and to be a small part of its growth. It has become the model for Catholic philanthropy through the dedication and hard work of many people. It has risen from a tiny seedling to become a significant force in dealing with the needs of others. I pray that it will continue to grow through the generosity of people like you here tonight. I have come to learn that life is more accurately measured by the lives you touch than by the things you acquire. I know, you know - that our achievements are the work of our commonality; that people working together make the difference; that hope born of energy and commitment has transforming power in our lives and that no matter how ordinary we are, we are able to achieve extraordinary deeds when we take responsibility for ourselves, our families and our communities."

We will always be deeply grateful to Gene for his many contributions to The Catholic Foundation and our Catholic community. 🙏

CATHOLIC SYMPOSIUM MEETS IN DALLAS AT THE CATHOLIC FOUNDATION'S NEW OFFICES



The Catholic Foundation was honored to host the 5th annual Catholic Symposium at our new offices on Merit Drive on April 19-21, 2016. The presidents of 16 different Catholic Foundations throughout the country convened for two full days of discussions covering over nineteen topics critical to the operation and success of our respective foundations. "It was a wonderful event," says Matt Kramer, President and CEO. "It allows everyone to share their experiences and helps us all to become more effective in our ministries. I'm looking forward to next year in Denver."

So in this spirit of abundance of information in lieu of scarcity, the group was able to exchange notes, electronic templates and documents, to help support and benefit each other. By working together and collaborating in this way, we are expanding the effectiveness of the reach of our shared mission to serve others.

We are grateful to Bishop Greg Kelley who celebrated Mass for the group at St. Jude Chapel in downtown Dallas. It was a special time for all.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

ENDOWMENTS

You no longer see Edwin (“Ed”) Wilkins at St. Monica at 6:45 Mass every morning or picking up the books after Mass each day, but Ed loved his parish and Ed knew the power of endowment. He created an endowment fund at The Catholic Foundation through his will that would provide an income stream for the benefit of St. Monica in perpetuity.

Louise Buhner, a 5th generation Swiss immigrant, was active in Catholic causes throughout her life. Louise established a Charitable Remainder Trust at The Catholic Foundation using stock, bonds and her home. She received income from this fund throughout her lifetime, and upon her death in 2000 it became a per-

manent endowment. Louise knew the power of endowment. To date, the fund she established has provided \$2.3 million in grants to Ursuline Academy of Dallas, Dallas Catholic schools for education and tuition assistance, and the Dallas Catholic elderly.

What is an endowment? Basically, an endowment is a sum of money, permanently set-aside for the benefit of a charitable organization or charitable causes, which is invested for long-term growth and produces an annual income stream to support an organization (the same as Ed Wilkins did for St. Monica) or an area of interest (similar to Louise Buhner’s wish to support Catholic education).

The power of an endowment is in its continuity. Your gift is preserved in perpetuity, with the

funds pooled for maximum benefit and invested to achieve long-term capital growth.

With an endowment comes several advantages:

- Provide dependable, perpetual income to your chosen cause or nonprofit
- Carry on your family’s name – and legacy – forever
- Allow successive generations to continue family giving traditions

We have many more stories at the Foundation of other donors who have created endowments and we would be delighted to explore endowment opportunities with you to create your lasting legacy.

Please give us a call at 972-661-9792. 🐟

DONOR PROFILE:

Father Jason Cargo

To say that Father Jason Cargo is intellectually curious would be an understatement. An Eagle Scout, degreed Meteorologist and former NET Ministries (National Evangelization Teams) missionary with two degrees in Sacred Studies, Father Cargo has a broad range of interests. He is also well-traveled, having served in Canada in addition to his four years of pastoral studies in Rome.

After ordination in 2007, Father Jason had tours of duty at two parishes as a Parochial Vicar prior to his first pastor assignment at Immaculate Conception in Corsicana in 2011. After more than four years, Bishop Farrell recently asked him to serve in the same capacity at St. Joseph in Richardson. Despite the demands of his duties as pastor, he also finds time to serve with numerous worthy organizations including TOBET, Sacred Heart Book Store, the Diocesan Committee on Scouting, the Catholic Pro-Life Committee and Hope Center in Corsicana.

Not only is Father Jason generous with his time and talent, he also shares his gifts of treasure, using a donor-advised fund at The Catholic Foundation to assist him. After hearing about the idea from Foundation donor Marge Giangiulio, he decided to take a look himself. When meeting with Michael George, he found that he, or anyone, can give at even a moderate giving level. “Involvement with The Catholic Foundation isn’t just for those with ‘deep pockets,’” says Father Jason. “I enjoy the flexibility and ease of using just one account to recommend grants for all of my charitable interests.”

Father Jason is a fan of the Foundation’s online DonorLink feature to check his fund balance, review who he’s supported, make new grant recommendations anytime and anywhere, and even make donations from his cell phone. “The Foundation’s response time is great. The accepting organization is quick in receiving the distribution, usually less than a week.” The flexibility also extends to his charitable intentions after death, and he was pleased to learn that his donor-advised fund becomes a permanent endowment after he is gone. “It is a comfort to know that I will be able to support the causes that were so important to me during my lifetime for years to come.”



Father Jason Cargo

Father Jason knows that he’s been blessed to serve in places where parishioners are passionate about their involvement at their local church. “The Foundation’s Parish Endowment Program is a great way to make our parishioners aware of ways to stay connected to their beloved parish even after they’re gone,” says Father Jason. “The Parish Endowment Program is an ideal way that people can give back to the parish and continue to support the community that nourished and enriched their day-to-day existence for so many years during their lifetime.” 🐟

A LIGHT On

SPRING 2016 GRANT DISTRIBUTION

On May 3, 2016, more than \$1.2 million was awarded to 19 recipients at the 2016 Catholic Foundation Spring Grant Ceremony, held at Notre Dame School of Dallas. Grants from Catholic Foundation funds will help various projects for local schools, parishes and organizations. The grants include roof replacements, construction of new buildings and tuition assistance throughout the local Catholic community.

Several school construction projects received assistance such as **Bishop Dunne Catholic School's** renovation of their science labs provided by partial funding from the William & Mary Jane Jaspersen Fund of The Catholic Foundation, **Cristo Rey Dallas** for their construction of a new school building, as well as **St. Pius X Catholic School's** restroom renovation project.

Soon, there will be no more weekly parishioner overflow at **Good Shepherd Catholic Church in Garland**, as the fundraising efforts to build a new church will increase their capacity from 400 to 1,200 parishioners. Three other churches that received grant money for renovation and expansion: **St. Joseph Catholic Church** for pews in their new sanctuary; **Montserrat Jesuit Retreat House** for the renovation of St. Ignatius Chapel with partial funding provided by the Roper Fund; and **St. James Catholic Church** to help replace windows in their Faith Formation Building using partial funding provided by the Joe & Hazel Fechtel Fund.

First time grant recipient in south Dallas, St. Elizabeth of Hungary Catholic Church, will

replace the roofs on the church and rectory, which both suffered major damage from a tornado and hail storm. **Holy Cross Church**, a parish that does a lot with very little, also needed to replace roofs as the 1960 School building and 1958 Convent Building roofs are both over 20 years old. Other roof repair grant recipients include **St. Mary's Parish**, as well as roof and HVAC replacement assistance at **Our Lady of Lourdes Catholic Church** using partial funding provided by the Osborne Family Fund.

Immaculate Conception Parish in Grand Prairie needed to update campus technology so that they could have functioning Wi-Fi capabilities for the increasing amount of programs needed to run on wireless laptops and other devices.

Construction of the new Dining Hall will be finished before summer campers arrive at **The Pines Catholic Camp**, the only Catholic outdoor camp of its kind in this region. This will enable them to host larger camp and school programs, thanks to partial funding provided by the John Thomas Uhl Fund.

The Louise Buhrer Endowment Fund made a huge impact this spring as it assisted three organizations with tuition assistance including **St. Mary of Carmel Catholic School**, **St. Mary's Catholic School** as well as supporting **Santa Clara of Assisi Catholic Academy** with additional funding from the Dorothy Irving Memorial Fund. Additionally, the Louise Buhrer Endowment Fund, and the Harper Senior Citizen Funds, were able to help **Catholic Charities** support Senior Services at the Brady Center. **Holy Family Catholic Academy** and **St. Philip & St. Augustine Catholic Academy** both received tuition assistance thanks to funding provided by the Dorothy Irving Memorial Fund.

"These schools, parishes and organizations are the lifeblood of our Catholic community, and it's an honor to support their work," said Matt Kramer, President and CEO of The Catholic Foundation. "The grants we presented today wouldn't exist without the donors who compound their charitable gifts by giving through The Catholic Foundation. Because of their generosity, were able to continue making a difference in addressing the ever-changing needs of the Catholic Community." 🐣



The Pines Catholic Camp new dining hall construction, April 2016.



Construction is underway at the new Good Shepherd Catholic Church.

CATHOLIC FOUNDATION GIVES TORNADO DISASTER RELIEF GRANT

Coming together during a time of tragedy, The Catholic Foundation and the Society of St. Vincent de Paul and Catholic Charities have collaborated to aid our North Texas brothers and sisters in their time of need after violent storms and tornadoes hit some areas of North Texas on December 26, 2015. The storms resulted in 11 deaths, and damages are expected to cost more than \$1 billion. Trustees of The Catholic Foundation gathered following the disaster to approve a \$200,000

emergency grant. The Catholic Foundation's grant, as well as money collected during Mass collections, was distributed to Catholic Charities of Dallas and the Society of St. Vincent Diocesan Council of Dallas to reach those in need.

Mike Pazzaglini, Executive Director of Society of St. Vincent de Paul, estimates that over 250 family cases have been opened and 71 closed with over \$176,000 in direct assistance. And they are still anticipating over \$625,000 in

unmet needs. "We are excited to be a part of this outstanding partnership between The Catholic Foundation and the Society of St. Vincent de Paul along with Catholic Charities," Pazzaglini said. "We support Bishop Farrell and his desire to promote these types of combined efforts within the Catholic community, and we are confident that we will be able to maximize the benefits of this grant money to help as many families as possible in their long-term recovery efforts." 🐣

CATHOLIC FOUNDATION 34th ANNUAL AWARD DINNER

On Friday, Feb. 19, 2016, more than 1,600 guests gathered to honor Rt. Rev. Denis Farkasfalvy, O. Cist., at The Catholic Foundation's 34th Annual Award Dinner at the Hilton Anatole. Dinner Chairmen Jim and Barbara Moroney led the Foundation's Award Dinner Committee in selling the most tables in the history of the event.

Fr. Denis was selected as the 2016 award honoree for his impact on the Cistercian Abbey and School in Dallas and the Cistercian Order internationally as well as to honor his longtime community presence. In recognition of Fr. Denis, The Catholic Foundation provided Valley of Our Lady Monastery with a \$10,000 grant and also presented a scholarship award to Patrick Andrews, a junior at Cistercian Preparatory High School.

1. Vicky Lattner, Chairman and Matt Kramer, President and CEO of The Catholic Foundation present Fr. Denis with the 2016 award. 2. 17-year-old scholarship winner and Cistercian Preparatory School junior Patrick Andrews. 3. (L to R) Waddell and Sally Mashburn, Sara Martineau, Rosemary Haggard Vaughn and David Martineau. 4. Rt. Rev. Abbot Peter Verhalen, O. Cist., accepts the Catholic Foundation grant award on behalf of the Valley of Our Lady Monastery from Chairman of The Catholic Foundation Vicky Lattner. 5. Dinner Chairmen Barbara and Jim Maroney, with Father Denis (center). 6. Carolyn and Jere Thompson Jr. join the standing ovation for Fr. Denis.



ADMIRAL PATRICK WALSH, USN (RET.), ADDRESSES THE ADVISORY COUNCIL AT ANNUAL BREAKFAST MEETING

Admiral Patrick Walsh, USN (Ret.), Senior Vice President iSIGHT Partners, a Dallas-based company that is a global leader in cyber threat intelligence and security, gave a compelling presentation on "Contemporary Issues in National Security." Additionally, he is the General Manager for ThreatSPACE, a division of the company that provides enterprise-level, cyber crisis simulation opportunities for commercial industry and government agencies. On April 28, 2016 at Brook Hollow Golf Club, after a warm introduction from donor Roger Staubach, Admiral Walsh delivered his insightful presentation to Advisory Council members, providing valuable information and engaging commentary.

1. (L to R) The Catholic Foundation President and CEO Matt Kramer, Advisory Council Chair Lydia Novakov, Admiral Patrick Walsh USN (Ret.), Marianne and Roger Staubach
2. (L to R) Advisory Council member Charlie Fechtel, Trustees Robert Theole and Scott Moore, and Past Foundation Chairman Charlie Tusa.
3. Admiral Walsh gives a compelling presentation on national security.



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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:

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



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2016 ANNUAL ART COMPETITION UNVEILING

October 12, 2016 12:30 p.m.
Catholic Foundation Plaza, Dallas Arts District

Call for local artists to enter competition by August 25, 2016
See catholicfoundation.com for entry details.

SAVE THE DATE!

PROFESSIONAL ADVISORS SERIES

Featuring Jonathan G. Blattmachr
December 8, 2016 at The Belo Mansion
7:30 a.m.
2 hours CE