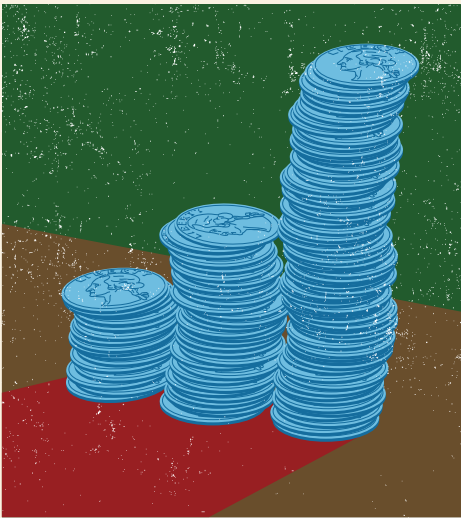


THE Good Word

VISIT OUR WEBSITE: www.catholicfoundation.com

Benefits from Pooled Investments



The Catholic Foundation has recently introduced some exciting new changes surrounding investments within the funds that have been established at the Foundation. Five model pools have been created to provide a low cost, institutional quality offering for donors.

These five model pools are:

- **MONEY MARKET POOL:** 100% in a money market fund
- **ULTRA CONSERVATIVE POOL:** 30% in a money market fund and 70% in high quality fixed income funds
- **CONSERVATIVE POOL:** 30% in US equities, 10% in a money market fund and 60% in high quality fixed income funds
- **BALANCED POOL:** 30% in US equities, 20% in international equities, 5% in a money market fund and 45% in high quality fixed income funds
- **GROWTH POOL:** 40% in US equities, 30% in international equities, 5% in a money market fund and 25% in high quality fixed income funds

Initially, the US equities portion of the pools will be indexed and the international equities component will utilize two active managers.

Donors will benefit from the new pool structure in various ways, including:

- Current and historic return information and market analysis on a timely and consistent basis
- Independent investment consultants continually monitoring each model
- Additional investment options
- Access to managers that are closed to new investors
- Changes can be made quickly and efficiently.

Our donors are the most important constituents that we serve. We believe these changes will benefit our donors as well as our organization as we strive to impact our community in bigger and better ways going forward. Should you have any questions regarding the new model pools we are happy to meet with you at any time. We thank you for your support of The Catholic Foundation and the community which we serve. If you would like to discuss creating a charitable fund please call us at 972-661-9792. 🐟



THE PRESIDENT'S LETTER

This past December the Foundation celebrated 60 years of serving donors and promoting compassionate charitable giving in our Catholic community. Also of note, during the last 30 years more than \$100 million has been granted into the community from charitable funds and trusts. It is because of the generosity of our donors that we are able to continue our mission and impact the communities we serve. Thank you for the trust and confidence you place in us to carry out your charitable intentions.

We are grateful to you who have chosen to conduct your current giving and/or have established your estate/legacy plan through The Catholic Foundation toward your favorite Catholic and non-Catholic charities.

During 2015 we completed additional stages of our strategic plan, ensuring the Foundation will provide a better level of service to our existing and new donors.

Some key internal accomplishments for 2015:

- After more than 30 years at Toll Hill Plaza, The Catholic Foundation moved to Merit Tower in August. We were able to reduce costs, and move to a building with enhanced amenities while allowing for future expansion.
- Implemented pooled investments for all of our assets. Please read more about this critical initiative in this newsletter.
- We moved to the cloud in February and began the implementation of a new integrated database system. Conversion should be completed by mid 2016.

(continued on page 5)

A Strong FOUNDATION

3 NEW TRUSTEES JOIN THE CATHOLIC FOUNDATION BOARD

Effective January 2016, three new Trustees have been named to three year terms on the Board of Trustees of The Catholic Foundation. They are Victor Arias Jr., Senior Client Partner of Korn Ferry International, Javier Creixell, Managing Member and Portfolio Manager of Trinity Fiduciary Partners, LLC and Epiphany Funds, and Michelle Vopni, Ernst & Young Dallas Office Managing Partner.



Victor Arias Jr. is a member of the Church of the Incarnation and volunteers his leadership to many Catholic organizations including Knights of Malta, Church of the Incarnation

choir, St. Ann Parish Perpetual Adoration, Cistercian Booster Club President and is an Irving Symphony Board member.

Victor received his BBA from the University of Texas at El Paso and his MBA from Stanford University. Since 1991, Victor has had significant board service experience serving upon numerous Corporate boards and Advisory Councils including Popeyes, Ediomia and PepsiCo, as well as Non-Profit service to Stanford University as Board of Trustees Chair, University of Notre Dame, Institute of Latino Studios Advisory Council, University of Texas at El Paso, and Co-founder and Former National President of National Society of Hispanic MBAs.

"This is truly a privilege and opportunity to give back to the community we have called home for 23 years," Victor shared. "We have seen lots of change in the membership of this diocese and it is important to reflect the great work of the Foundation with the needs of our very diverse population. This is an exciting time for the Catholic Church in DFW and I am ready to maintain the legacy of hard work and dedication of my current and past trustee colleagues."



Javier Creixell, who has also served as the chairman of Toston LLC investing company since 2001, has over 35 years of investment and banking experience in the international financial arena, and has

widespread managerial leadership experience in Mexico, Spain, Chile and US.

Javier holds a BBA from the Anahuac University in Mexico City and an MBA from the University of Texas at Austin. After many years as an executive in several internationally recognized financial organizations, he remains well connected in Latin America and serves as a board member for numerous prestigious organizations.

Javier and his wife Tere participate together in the Catholic prison ministries, the board of the Dominican Priory in Irving, are Eucharistic Ministers at The Church of the Incarnation and are also members of Holy Family of Irving.

Javier shared, "It is an honor and privilege to have the opportunity to serve as a trustee of The Catholic Foundation. I am very happy to be able to give back to the Catholic community from which I have received many blessings in my life."



Michelle Vopni, a St. Rita's parishioner, mother of 3 and native Dallasite, earned her BBA degree from the University of Texas at Austin and is a Certified Public Accountant. She has been

an Ernst & Young partner over 11 years and serves as the "face and voice" of Ernst & Young in the Dallas community. In addition to serving on the American Heart Association Go Red Executive Leadership Team, she has also served several years as chairman for various committees including St. Rita Finance Council, St. Rita's School Advisory Council, and Ursuline Academy Foundation.

Michelle has more than 23 years of experience serving large public and private clients in a variety of industries including accounting, audit and finance, as well as activities related to public offering, SEC reporting, and mergers and acquisitions with significant technical experience with inventory valuation, revenue recognition, lease accounting and restricting charges.

"I am delighted to serve on The Catholic Foundation Board of Trustees," says Michelle. "I feel privileged to have the opportunity to provide my time and talent to an organization that has such a tremendous impact on our Catholic Community."

"We thank these three community leaders for accepting this commitment to join our other board members and lead The Catholic Foundation into the future," says Matt Kramer, President

and CEO. "Each brings a unique background and life experiences that will help us promote philanthropy to make support of our community possible."

6 OUTGOING TRUSTEES

Six members of the Board of Trustees of The Catholic Foundation completed their terms at the end of 2015, and while on the board they shared their time and talent in the following areas:

Thomas W. Codd, Jr. joined the board in 2008

Tom chaired the following committees: Audit and Administration 2009 & 2010, Distribution 2011 & 2012, Executive 2013 & 2014, and served as Board Chairman in 2013 & 2014, and as Immediate Past Chairman in 2015. Tom also served on the Distribution committee, Audit and Admin committee, Executive committee, and the Nominating committee.

Walter Adams joined the board in 2009

Walt chaired the Investment committee in 2013 and has served on that Investment committee from 2010-2015. He also served on the Distribution committee, Executive committee and the Audit and Admin committee.

Lisa Dickson joined the board in 2009

Lisa chaired the following committees: Audit and Administration 2012, Governance 2014, Distribution 2015 and served on the Audit and Admin committee, Distribution committee, Executive committee, and the Governance committee.

Raul Estrada joined the board in 2009

Raul chaired the Distribution committee in 2013 and the Development committee in 2015. Raul served on the Distribution committee, Development committee, Governance committee, and Executive committee. Raul was also responsible for the Foundation's participation in the 2015 Pope in the Park project.

Joseph C. Murphy joined the board in 2009

Joe chaired the Audit and Administration committee in 2013 and served on that same committee 2010-2015. In addition, he served on the Distribution committee, the Executive committee and the Governance committee.

David Woodyard joined the board in 2009

Dave chaired the following committees: Development 2011 & 2012, and Governance 2013 and served as Vice Chairman of the board in 2015. He also served on the Governance committee, Executive committee, Audit & Admin committee, Development committee, Distribution committee, and the Nominating committee.

Giving SPIRIT



Giving 101

by Cheryl Unis Mansour, Vice President of Development

PERMANENT IRA ROLLOVER GOOD NEWS FOR DONORS!

On December 18, 2015 President Obama signed the Protecting Americans (PATH) Act of 2015 which included legislation to permanently extend the IRA Charitable Rollover for 2015 and beyond. The bill allows people who are 70 ½ or older to transfer up to \$100,000 from an IRA to a qualified public charity free of federal income tax. The amount transferred can also be used to satisfy a donor's required minimum distribution (RMD).

Qualified IRA Charitable Rollover gifts to The Catholic Foundation can go to a charity of your

choice through a designated fund, scholarship fund or field of interest fund. Unfortunately, gifts cannot be made from an IRA to a donor-advised fund.

As an example: if you would like to make a gift from your IRA and create a designated fund at The Catholic Foundation that would provide funds for the support of your parish, your school or any other charity; or a gift to provide scholarships at a particular school; or you can also make a gift to the Foundation's unrestricted Philanthropy Fund to help meet the ongoing and changing needs in our Diocese.

Please remember you must notify your IRA custodian to make a direct transfer of the distribution amount from the IRA to The

Catholic Foundation. We can work with you to create a fund within the IRA Rollover guidelines that will support a charity or area of interest that is important to you.

The new law applies retroactively to charitable IRA distributions made any time during this 2015 tax year, and will continue to permit these IRA-funded charitable gifts into 2016 and future years.

To explore the available possibilities please call us at 972-661-9792. There is never an obligation and we are always delighted to help you through the thought process.

Wishing you all God's blessings in the New Year! 🐣

DONOR PROFILE:

Susan Stanzel

Civic leader Susan Heller Stanzel is a wife, mother of 5, grandmother of 15, fifth generation Texan, and has an extensive and impressive philanthropic leadership resume too long to list in this short article. Like her father before her, Susan believes the greatest honor she can receive is the "joy of doing for others" and, even as a young girl, has always volunteered graciously for the job no one else wanted to do. Susan Heller graduated from Ursuline Academy in 1957 and later that same year she married Tom Stanzel, an Air Force Officer. During their thirteen year journey around the globe, Susan's main passion was, and still is, selflessly volunteering to help others, her faith and Catholic values.

In 1970, Susan returned to Dallas and continued her tireless charitable work with Holy Trinity parish and later at Christ the King parish. Over the years she has volunteered her time and has served on dozens of highly-respected and well known boards and committees throughout the Dallas community. In 1985 Susan and her husband Tom co-founded the Cardinal Mindszenty Foundation

of Texas as a way to inform others about communism and public policy and to promote involvement in the Catholic Church through founding and growing multiple conferences featuring highly respected national speakers.

Susan's father, Frank Heller, was not only a powerful influence in the original founding of The Catholic Foundation, he was a former Chairman of the Board as well. Her loyalty to the Foundation has always been strong. In addition to her life insurance policy benefitting The Catholic Foundation that she donated in 1990, she and her husband Tom have used their growing donor advised fund since 1983 to assist with their charitable giving. By donating a life insurance policy at a young age, she wants to inspire young people with her example, that they can start making a difference at any age. Susan has long understood the value of utilizing resources of The Catholic Foundation to benefit causes closest to her heart.

Susan followed in the steps of her father by serving as a trustee of the Foundation for nine years and has been a strong advocate by assisting in building relationships with generously minded individuals and organizations in our community as well as high profile international organizations such as the Franciscan Foundation for the Holy Land, which has a designated fund at the Foundation to benefit their University



Susan and Tom Stanzel

Scholarship Program. Susan's most recent passionate efforts have been towards their mission of providing outstanding service to the plight of the Christians living in Israel and Susan herself has organized 6 pilgrimages to the Holy Land.

Despite the plethora of leadership positions and abundance of noteworthy awards that 1999 Catholic Foundation Award recipient Susan Heller Stanzel has achieved, she considers her most noteworthy accomplishment and greatest blessing in life to be her marriage of 58 years to her husband, Tom, and the rearing and education of their 5 children, Rose, Richard, Paul, Michael, and Rachel. 🐣

A LIGHT On



Jim and Barbara Moroney

2016 CATHOLIC FOUNDATION AWARD DINNER COMMITTEE

Jim and Barbara Moroney are serving as chairmen of the 2016 Award Dinner Committee for the 34th annual Catholic Foundation Award Dinner on Friday, February 19, 2016 at the Hilton Anatole in Dallas. "Barbara and I would like to thank the Dinner Committee for leading an effort that has resulted in 145 tables already committed for the evening.

On a personal note, we are especially grateful for the opportunity to honor Abbot Denis who was my Form Master through nine years at Cistercian and who married us, baptized our children and celebrated the funeral Masses of both of my parents, along with the countless wonderful things he has done for both the Cistercian School and the Cistercian Abbey for so many years.

It is a real privilege for us to have the opportunity to help The Catholic Foundation in this way. The Catholic Foundation provides so much help to so many good causes throughout our Diocese, especially for those who are most in need. We look forward to a great dinner in February."

To pre-reserve your table at the 2016 Annual Award Dinner, please call 972-661-9792 or visit www.catholicfoundation.com.

The 101 Dinner Committee members for this year are:

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Mr. Alfredo Duarte
Mr. Raul Estrada
Mr. Gregory J. Fisher
Mr. Robert M. Galecke
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Mr. and Mrs. Burk C. Murchison
Mr. Joseph C. Murphy
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IN MEMORIAM: THE REVEREND MONSIGNOR THOMAS W. WEINZAPFEL

On January 1, 2016, the Dallas Catholic community sadly lost one of its most treasured friends, Msgr. Thomas W. Weinzapfel. Father Tom, as his loved ones called him, died due to injuries he suffered from a fall he had on Christmas Eve, just one day following the celebration Mass and reception of his 70th Anniversary of Ordination. The December 23rd Anniversary celebration was attended by hundreds of his friends, colleagues and former parishioners at St. Pius X Catholic Church in Dallas.

Monsignor Weinzapfel, the longest serving diocesan priest of the Diocese of Dallas, served as pastor at St. Pius X from 1956-1996 before he retired after almost 41 years. Monsignor was a philanthropist as well as a priest and was a strong believer in charity, especially when it came to education. He was a powerful force in the founding of Bishop Lynch High school in 1963 where students and faculty will continue to enjoy the familiar Monsignor Weinzapfel

Atrium bearing his name. Father Tom was also a Catholic Foundation friend, donor, supporter, advocate, Legacy Circle member, and he gave many inspirational and memorable invocations for Catholic Foundation Award dinners and other events. Starting in 2001, he established several Charitable Gift Annuities as well as a Donor Advised Fund at The Catholic Foundation so that at the end of his life, the remainder of these gifts will be used by the Foundation to support what Monsignor termed in 2001 as "those programs that will represent what will then be the greatest needs of the Diocese." "On behalf of the Trustees, Officers, and staff of The Catholic Foundation, we would like to express our deep appreciation and gratitude for our friend Father Tom," says Matt Kramer, President and CEO. "Like so many supportive clergy members before him including our Founder Bishop Thomas K. Gorman, his advocacy and physical presence will be greatly missed. His influential legacy lives on, and we will always remember Father Tom for his love, dedication and support of The Catholic Foundation."

THE 9th ANNUAL ADVISORS SERIES

FOR ESTATE AND WEALTH MANAGEMENT PROFESSIONALS

The Catholic Foundation presented our 9th annual Advisors Series event on December 9, 2015 which was held at The Belo Mansion. Each year The Catholic Foundation presents a program to provide quality continuing education opportunities for our local professional advisor community. Outstanding professionals of national renown lead the seminar and provide current information on many of the most pressing legal and financial considerations involved in wealth management and estate planning, including philanthropic considerations.

The most recent session, *Selected Recent Wealth Transfer Developments* (including nontax topics), addressed important estate, gift, and generation-skipping transfer tax developments. Our esteemed speaker, Professor Jeffrey N. Pennell of Emory University School of Law in Atlanta, Georgia, focused on procedure, income tax, and state law developments of significance to planners everywhere. His presentation shared their practical significance to everyday planning and drafting, particularly for middle rich clients, and focused on how the law as it is developing may apply to situations that have not yet tested the boundaries of the law. Attendees received 2 hours of continuing education credit. Stay tuned, we will be announcing next year's event details soon. Many thanks to our wonderful sponsors:

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1. 2015 Advisor Series at the Belo Mansion 2. Dan Novakov 3. Larry Wolfish 4. Keith Novick 5. Lora Davis 6. Scott Deke and Alan Davis 7. Robert Collier



The Presidents Letter

(continued from page 1)

- Parish/Organization Endowment Campaigns - We had detailed discussions with twenty organizations in 2015. Every Catholic institution in our community will be approached over the coming five years, providing an opportunity that will help these organizations seek and receive planned gifts to support their mission in perpetuity.
- Radio Advertising - We started new media for advertising and have increased our social media presence.
- Capital Campaigns - We substantially completed the pledge receipt phase for Our Faith Our Future Capital Campaign, along with eight other parish combined campaigns. The sheer number of transactions and complexity of the work have been professionally handled by our Foundation staff.

We are blessed by the significant growth of The Catholic Foundation the last several years and look forward to the opportunities to expand the awareness and reach of The Catholic Foundation in the years to come.

Thank you again for making a difference in our world and for allowing The Catholic Foundation to help you with your charitable giving.

May 2016 bring you and your families health and prosperity!

J. MATTHEW KRAMER

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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
12222 Merit Drive, #850
Dallas, TX 75251
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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We've Moved!

We are pleased to announce the relocation of The Catholic Foundation offices to Merit Tower.
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SAVE THE DATE!

**THE CATHOLIC FOUNDATION
AWARD DINNER**

Friday, February 19, 2016
6:30 - 10:00 P.M.
Hilton Anatole