

## The Foundation and the Catholic community make strides for the future

Success at The Catholic Foundation is a reflection of generous donors who share the vision of our founding members – to provide for the current and future needs of our Catholic community. As donors continue to trust in the Foundation to help fulfill their charitable giving, they will continue to make a lasting impact.

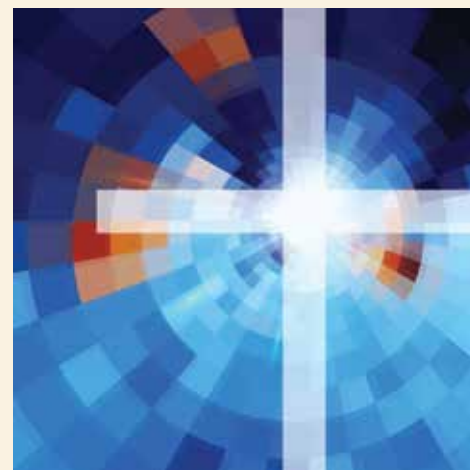
In 2014 The Catholic Foundation welcomed new donors and opened a record number of new fund agreements in a given year, and current donors at the Foundation made a record number of new contributions to their existing funds bringing our total assets under management to more than \$200 million. Last year the Foundation processed a record \$12.1 million in grants, from Donor Advised and Designated Funds and the Foundation's unrestricted Philanthropy Fund, to more than 1,200 charitable organizations throughout North Texas and across the country.

Donors to the Foundation are also contributing to capital campaigns. We are honored that Bishop Farrell turned to The Catholic Foundation to establish a Designated

Fund for the Our Faith - Our Future Diocese of Dallas Capital Campaign because of the Foundation's nearly 60 years of proven, successful and thoughtful stewardship of donor funds. Eight parishes in the Diocese of Dallas have also utilized the Foundation to establish Designated funds for their combined campaigns which not only fulfill the needs of the Our Faith - Our Future capital campaign but will also address individual parish capital needs.

While the Diocese of Dallas is significantly involved in the fundraising effort, The Catholic Foundation will receive, invest and distribute the funds, which is consistent with the Foundation's purpose, to support various needs of the Diocese.

The Catholic Foundation will make distributions in accordance with its procedures, and it will endeavor to ensure that donors' intentions in donating to the fund are being met by the distributions. The Foundation will consider the recommendations of the Bishop, as Advisor to the fund, in determining the nature and amount of the distributions in alignment with the philanthropic purposes of the fund.



All parishes in the Diocese of Dallas have participated in the Our Faith - Our Future Capital Campaign and some have already met their goals and the Bishop has requested funds to support their parish causes.

"As a pilot parish, and two years into our parish goal of \$1.7 million, our parishioners have responded with enthusiasm surpassing our goal," says Fr. Michael Forge, Pastor of Mary Immaculate Catholic Parish. "It is clear to our parishioners that our parish is not just a church on a hill, but part of a vast community in the Diocese of Dallas, and responded to the

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### THE PRESIDENT'S LETTER

Welcome to our spring edition of The Good Word. More than a third of the way through the year, we've already experienced new records in 2015; record setting attendance at our Catholic Foundation Award Dinner honoring Ed Leyden and record first quarter contributions

to The Catholic Foundation.

We are humbled by the generosity of our existing donors and new donors who have recently opened funds at The Catholic Foundation. Individual donors rely on The Catholic Foundation to facilitate their current charitable giving and to assist them in creating legacy gifts that will impact their favorite charities in perpetuity. Institutions rely on The Catholic Foundation for our expertise in

planned giving while also entrusting us to be good stewards of funds donated for specific purposes. Whether individuals or institutions, our job is to ensure donor's intention is carried out.

Giving through The Catholic Foundation not only benefits your favorite charities, our modest fees or investment income earned from all funds goes into our discretionary Philanthropy Fund. As more donors understand the value of using our services, giving through The Catholic Foundation to their favorite charities, the greater the impact will be from our Philanthropy Fund to those institutions we serve in our nine county Catholic community.

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: *Jan Collmer and Eduardo Esteve*



Jan Collmer



Eduardo Esteve

During the past year The Catholic Foundation lost two former members of the board of trustees: Joseph “Jan” Collmer and Eduardo Esteve, both prominent businessmen who served the local Catholic community.

A native Dallasite, Collmer graduated from Jesuit College Prep, served in the Navy as a pilot and later completed his bachelor’s degree in mathematics at the University of Texas at Arlington while working at Texas Instruments and at Varo, Inc. In 1979 he founded Collmer Semiconductor, Inc. His 50-year business career was complemented by professional and civic associations including

the American Electronics Association, the Texas Aerospace Commission, Young Presidents Organization, Dallas Council on World Affairs, Zale Lipshy University Hospital, UTD History of Aviation Collection and the Dallas Museum of Natural History.

Collmer served as chairman of the Greater Dallas Chamber of Commerce and the Dallas/Fort Worth International Airport. A lifelong aviation enthusiast, he introduced thousands to aerobatic flight and co-founded the Frontiers of Flight Museum at Love Field. A member of St. Rita Catholic Church, Collmer provided scholarships for individual students and served on the boards of Jesuit College Prep, Ursuline Academy, Dallas County Community College District Foundation, UT Arlington and the University of Dallas.

Born in Galveston, Texas, Esteve spent most of his first 10 years growing up in Spain until his family settled in Dallas in 1938. He graduated from Jesuit College Prep

and attended SMU before he joined the family commodities business, Esteve Brothers & Co., now known as ECOM Agroindustrial Corp. He spent time in Spain and Mexico before returning to Dallas in 1975. Esteve occupied leadership roles in the commodities industry, including serving as president of the American Cotton Shippers Association and the Cotton Council International in Washington, D.C. He was a strong believer in Catholic education and generously supported Christ the King Catholic Church and School, Cistercian Preparatory School, The Highlands School, Jesuit College Prep and Ursuline Academy.

Matt Kramer, president and CEO of The Catholic Foundation, said the Foundation owes Collmer and Esteve a debt of gratitude. “The Foundation benefited from their business acumen and entrepreneurial spirit, as well as their strong sense of community service.” 🐟

## New Trustees



(From L to R) Vicky Lattner, Rob Bertino, Jr., Robert Thoele, Matt Kramer

Seven new trustees have been named to three-year terms on the Board of Trustees of The Catholic Foundation. They are Robert (Rob) M. Bertino, Jr., Kathy Hoover, J. Scott Moore, Tom Nealon, Joe Popolo, Aileen Pratt and Robert Thoele.

Bertino, senior vice president of private wealth management, UBS, focuses on relationships with foundations, pension funds, endowments, family offices and individuals. He earned a bachelor’s degree from Notre Dame and an MBA from Southern Methodist University.

Bertino belongs to Christ the King Catholic Church and has served on the Foundation’s Advisory Council since 2008.

The director of taxation at Interstate Batteries, Hoover is a CPA and CFP with expertise in strategic financial planning and estate tax planning. A graduate of Notre Dame, she has served on the Foundation’s Advisory Council since 2003 and is a member of St. Monica Catholic Church.



(L to R) Vicky Lattner, J. Scott Moore, Aileen Pratt, Joe Popolo, Kathy Hoover, Tom Nealon, Matt Kramer

Moore, a CPA, was recently named North Texas market managing partner at PricewaterhouseCoopers and previously led the company’s tax practice. A graduate of Notre Dame, he is active in St. Thomas Aquinas Catholic Church and joined the Foundation’s Advisory Council last year.

Tom Nealon brings strategic information technology experience after a career that

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# Giving SPIRIT



## Giving 101

by Cheryl Unis Mansour, Vice President of Development

### PLANNED GIVING OVERVIEW

A fact sheet provided by The Catholic Foundation in the April e-mail newsletter offered an overview of planned giving using two pieces of a jigsaw puzzle. It's no wonder why. There are many options available to help you plan your estate and charitable giving in a way that benefits you, your family and charity. No two situations are alike, so the professionals at the Foundation welcome the opportunity to sit down with you and discuss what type of giving might help you solve the "puzzle" for you.

A **charitable bequest** is one of the easiest ways to make a gift that will create a lasting legacy. Often, dramatic savings in estate taxes result from a gift to The Catholic Foundation. The gift may be a specific sum of money, a percentage of an estate, or a certain piece of property. A donor can also designate The Catholic Foundation the "residuary

beneficiary" of all or part of an estate after other bequests are fulfilled, or a "contingent beneficiary" in the event other named beneficiaries do not outlive the donor.

In addition to making a gift to The Catholic Foundation through a simple bequest, donors have other ways to benefit the Foundation as well as take care of their families. For example:

- **Charitable trusts.** By establishing a charitable remainder trust, a donor can provide for family members in the near term and a charitable fund at The Catholic Foundation or the Philanthropy Fund later on. A charitable lead trust does the opposite: It provides immediate support for the Foundation and for the long-term needs of the donor's family in the future.
- **Charitable gift annuities** provide fixed income for life and a charitable tax deduction, and they allow the donor to avoid capital gains on the sale of appreciated property.

- With a **life estate reserved**, a homeowner donates a home to the Foundation, receiving a charitable income tax deduction but retaining the right to use the property during their life.

- **Life insurance.** A donor purchases life insurance, designating The Catholic Foundation as the beneficiary and they will receive a charitable income tax deduction for their gift.

- The **Charitable IRA** provides donors with a very simple way to gift the community. Name The Catholic Foundation as the beneficiary of the IRA and this bequest creates a charitable fund at the Foundation which can be used to further your charitable goals. Such a gift avoids the possible double taxation of IRA funds.

To learn more about planned giving and how The Catholic Foundation can help you fulfill your charitable and financial objectives, please call us at 972-661-9792. 🐟

### DONOR PROFILE:

## Ana and Andres Ruzo

For Andres Ruzo, coming to the United States in 1980 was a new beginning. Born and raised in Lima, Peru, he headed to College Station to earn an engineering degree from Texas A&M University. After graduation, he decided to remain in the United States and begin his entrepreneurial career, first working in Houston as a founding partner of an oil and gas company and then in commercial real estate.

"This country offered more security, stability and better opportunities," Ruzo said. "It was a great decision to stay in the U.S." In 1992, he moved to Dallas to continue his career as an entrepreneur and two years later, founded LinkAmerica as a firm that sold refurbished equipment within the communications industry. The firm, which now focuses on providing innovative logistics solutions and a suite of

technical professional services, was ranked in 2012 as the fastest-growing Hispanic company in the U.S.

Ruzo and his wife, Ana, started a family in Dallas, joining St. Patrick's Parish and sending their daughters to Ursuline Academy and their son to Cistercian Preparatory School. Andres' service with The Catholic Foundation as an Advisory Council member eventually led to the Ruzos establishing a Donor Advised Fund in 2013 to manage their philanthropy.

"I have started four foundations myself, but Ana and I thought a fund with The Catholic Foundation would be an effective way to align our personal giving with our service objectives," Andres said. They have used their fund to support the Bishop's campaign (Our Faith - Our Future) and will continue to identify other causes important to them.

Ruzo has served on several boards and commissions including Parkland Memorial Hospital, the Greater Dallas Hispanic Chamber of Commerce and the Texas Workforce

Commission. He likes to focus on charities benefiting education for children and currently focuses his leadership service with global organizations as a member of the World Economic Forum and The Pacific Alliance. His nonprofit organization, Lumen WeDoBelieve, has produced a smartphone app, Ignio, which allows its user to live, share and track their Catholic faith. 🐟



Ana and Andres Ruzo

# A LIGHT On

## SPRING GRANT DISTRIBUTION

Grants awarded by The Catholic Foundation will enable Dallas-area Catholic schools and churches to improve facilities, purchase equipment and update technology. Students and faculty will benefit as a result of \$887,706 in grants made this spring by The Catholic Foundation.

The grants included \$713,269 from the Foundation's Philanthropy Fund and \$174,437 in discretionary 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 serve the needs of the entire Catholic community.

Several of the awards will enable Catholic schools and churches to improve facilities or replace equipment. All Saints Catholic Church will replace flat roofs on its campus, and Bishop Dunne Catholic School will renovate its parking lot, with partial funding provided by the Thomas John Uhl Fund. Cristo Rey Dallas will refurbish its school grounds and buildings, while The Highlands School will replace its HVAC system, with partial funding provided by the Roper Fund.

The Notre Dame School will renovate its building, with partial funding provided by the William & Mary Jane Jaspersen Fund, and St. Joseph Catholic Church of Richardson will replace exterior landscape lighting. St. Patrick Catholic School will renovate and upgrade lower level restrooms, and St. Rita Catholic Community will install new campus lighting. St. Philip the Apostle Catholic School will repair and renovate its building, with partial funding provided by the Joe & Hazel Fechtel Fund.



Repairs and renovation of the St. Philip school buildings will impact the new academy being established in the 2015-2016 school year.

Classroom, office and facilities technology was a focus of several of the awards. Holy Family Nazareth Church will update office technology, Mary Immaculate Catholic School will update its computer lab, and St. Mark Catholic School will update technology. Mount St. Michael Catholic School will upgrade security and communications systems and also provide tuition assistance, with funding provided by the Dorothy Irving Memorial Fund.



St. Elizabeth of Hungary students will benefit from an updated technology lab.

Our Lady of Perpetual Help Catholic School will update technology, and, with help from the Dorothy Irving Memorial Fund, provide tuition assistance. St. Elizabeth of Hungary School will update technology, and St. Monica Catholic School will purchase electronic textbook licenses. Young Catholic Professionals will use a grant for technology and marketing. St. Bernard of Clairvaux Catholic School will purchase SMART Boards and provide for certified teacher training.

Still other awards will fund accreditation for Birth Choice Dallas, acquire a 14-passenger bus for Cistercian Preparatory School, purchase students desks and chairs for Holy Trinity Catholic School, and fund the "Together We Learn" program with Catholic Charities of the Zero to Five Funders' Collaborative of The Dallas Foundation. Funding by the Louise Buhner Endowment Fund will provide scholarships for students in 15 Diocesan schools to the Perot Museum of Nature & Science.

"As always, in awarding these grants, our trustees were attentive to the varied needs of these worthy organizations," said Matt Kramer, president and CEO of The Catholic Foundation.



Cistercian received a grant for the purchase of a new 14 passenger bus

"This particular round of funding will make possible brick-and-mortar projects as well as purchase and upgrade the technology that is so vital to preparing our students for the future. We salute the generosity and foresight of donors who made this possible." 🙏

### The Foundation and the Catholic community make strides for the future

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campaign not out of obligation, but as fulfilling their call to give.

Being able to address our local needs including initiatives that will continue to provide for and inspire our community has been a joy to experience. Recent distributions to our parish have funded a salary position of an outreach coordinator, maintenance to our pipe organ and the completion of a portecochère, an addition to our church that many are thankful for especially on rainy Sundays. We are all grateful."

In 2014 \$4.9 million was distributed to causes of Our Faith - Our Future and in early 2015 an additional six parishes in the Diocese of Dallas have received distributions in excess of \$2.5 million to meet their needs. 🙏

# 2015 ANNUAL AWARD DINNER HIGHLIGHTS



1. (From L to R) The Catholic Foundation President and CEO Matt Kramer, 2015 Catholic Foundation Award Winner Ed Leyden, and Foundation Chairman Vicky Lattner gather on stage after Leyden was presented with his award.
2. (L to R) The Catholic Foundation President and CEO Matt Kramer; Bill and Kasey Hollon, Chairs of the 2015 Catholic Foundation Award Dinner Committee; Barbara Leyden; Ed Leyden, 2015 Catholic Foundation Award Honoree; and Vicky Lattner, Chairman of the Foundation's Board of Trustees.
3. The award-winning Bishop Lynch High School A Cappella Choir.
4. (L to R) The Catholic Foundation President and CEO Matt Kramer presents The Catholic Foundation Scholar Award to Maria Rossini, a junior at The Highlands School in Irving.
5. Table hosts Marc (seated in the front) and Georgia Lyons (seated far right) and guests.

Surpassing last year's record, more than 1,400 people were in attendance at the 33rd Annual Catholic Foundation Award Dinner honoring Ed Leyden held on February 6, 2015. As a leader in education, Ed Leyden joins a community of members who embody and live out their philanthropic

goals for the betterment of our community. "This honor from The Catholic Foundation is altogether humbling in the best sense of the word," said Leyden. "I've been to most of the award dinners and know the list of past honorees is full of amazing, faithful stewards in our community. I didn't see this

in myself and am quite honestly overwhelmed and greatly appreciative of this recognition." This year's Foundation Scholar Maria Rossini, a junior at The Highlands School, was also presented with her award and scholarship for her senior year of high school.

## New Trustees

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included serving as group executive vice president and chief information officer for J.C. Penney, Inc. and executive positions with The Feld Group and Frito-Lay. He earned a bachelor's degree from Villanova University and an MBA from the University of Dallas and is a member of Christ the King Catholic Church.

Popolo, the CEO of the Freeman Company, the world's largest provider of event marketing services, has served on the Foundation's Advisory Council since 2012 and is active in local Catholic organizations, including St. Joseph's Residence and the Catholic Disability Foundation. A member

of Christ the King Catholic Church, he holds a bachelor's degree from Boston College and an MBA from the University of Chicago.

Civic leader and attorney Aileen Pratt serves as president of the Aileen & Jack Pratt Foundation, which aids children and women in need. She previously served as deputy general counsel at Amresco, overseeing the legal department. Pratt earned a bachelor's degree from Barnard College and a law degree from Columbia University. A past chair of Crystal Charity Ball, she has served on the Advisory Council since 2003 and is a member of Christ the King Catholic Church.

Thoele is chief financial officer and general counsel of HDNet LLC, which owns two cable/

satellite television networks. Previously he worked in venture capital and in investment banking at Bear Stearns and PaineWebber. Thoele earned his accounting degree from SMU and his MBA and law degrees from the University of Texas at Austin. He serves in leadership roles in his parish, Prince of Peace.

"The Catholic Foundation Board welcomes all seven of these community leaders and thanks them for blessing us with the time and expertise they will be giving to our community foundation," said Matt Kramer, president and CEO. "Adding new ideas and experience to our board will enable us to remain strong stewards while helping grow the Foundation."

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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](http://www.catholicfoundation.com)



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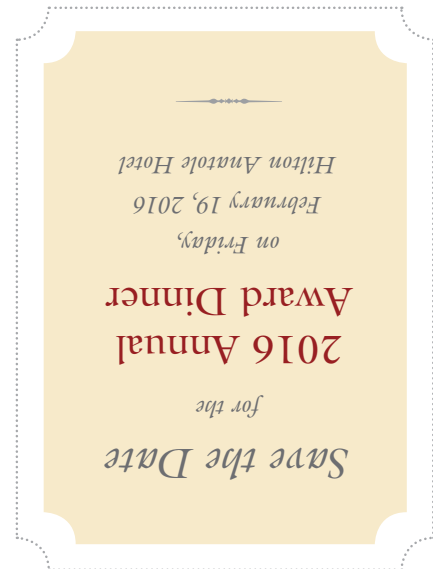
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