

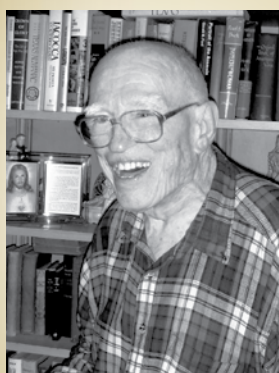


THE WILKINS TRUNK COMPANY  
OPERATED IN  
DOWNTOWN

DALLAS FROM 1902 THROUGH 1989.

EDWIN WILKINS,  
THE FOUNDER'S SON,  
FIRST BECAME A CATHOLIC  
FOUNDATION DONOR WHEN...

HIS FAMILY SOLD ONE OF THE COMPANY'S WAREHOUSES. YEARS LATER, WHEN IT WAS TIME TO PLAN HIS ESTATE,



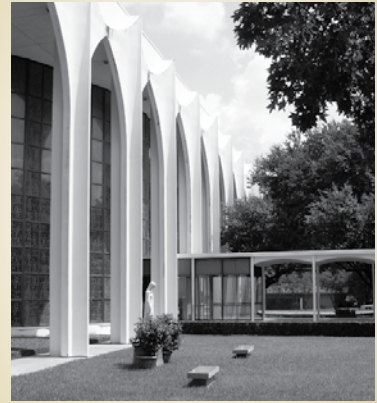
EDWIN SPECIFIED THAT IT BE GIVEN TO THE CATHOLIC FOUNDATION BECAUSE, AS HE PUT IT,

“THERE ARE SO MANY SCHOOLS AND OTHER PLACES THAT NEED HELP.” AND SO IT HAS COME TO PASS.

EDWIN WILKINS DIED IN 2008,



BUT BECAUSE OF THE  
PLANS HE THOUGHTFULLY  
MADE WITH HELP FROM  
THE CATHOLIC FOUNDATION,  
A PERMANENT ENDOWMENT



FUND WILL BENEFIT ST. MONICA CHURCH AND  
SCHOOL. AS HE STATED ABOUT HIS PLAN AND  
IN HIS GIFT IN AN INTERVIEW IN THE WINTER OF 2007,  
LOOKING AHEAD, “IT WILL LAST FOREVER.”

Edwin Wilkins’ story *is* the story of 2008 - a year  
in which good plans made by good people  
bore fruit for our community, as The Catholic  
Foundation fulfills its mission as a bridge from  
the past to the present and into the future,  
*from plans made to dreams fulfilled.*

## Dear Friends,

In 1955, a group of Catholic laymen, like you and me, wanted to impact our Dallas community in a positive manner. Their plan was to establish The Catholic Foundation. Today, we are fortunate that these good people had the desire, vision and dedication to help their church and community in a significant way. The Catholic Foundation today is dedicated to following those philanthropic dreams.

The trust our donors place with The Catholic Foundation leaves us greatly humbled and passionately dedicated to ensuring that each of their philanthropic goals are met. We are honored with this trust because The Catholic Foundation is a community foundation that is donor-focused, keenly experienced and highly knowledgeable about the religious, educational and charitable needs of our community.

In fact, we believe that The Catholic Foundation is a very effective way of identifying our community's needs and meeting those needs. We offer tax-advantaged giving, but more importantly, The Catholic Foundation provides a vehicle for donors to decide exactly how they want to establish their legacy. We offer good plans for good people.

Over the past 53 years, the Foundation has directly provided more than \$22 million to local organizations through hundreds of grants. Donor-Advised Funds maintained at the Foundation have accounted for even more in grants amounting to millions of dollars.

In 2008, approximately \$9 million was distributed throughout the Dallas Diocese from our various funds. It is because of the gifts and foresight of many donors that these grants were possible.

On the following pages, you will find inspiring stories of ordinary people with a variety of visions of how they wanted to help their church, school or nonprofit organization. The one thing they have in common is that they are all good people who have utilized the many opportunities provided by our Foundation to change lives.

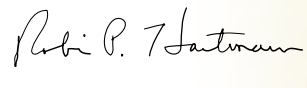
Maybe your gift was the one that helped fund a new roof and gym floor at St. Augustine Catholic School. Or perhaps your gift provided a \$500 surprise to a Catholic school teacher in South Dallas. You could even be one of the donors who established a named fund to honor someone you cherish. Or maybe, you haven't made that gift yet, but in your heart, you have a passion to help today and into the future. The Catholic Foundation can help you help achieve your goals. It's the reason why we are here, and it is our greatest joy.

The Catholic Foundation will continue to be good stewards of your legacy. We hope to partner with even more good people who wish to make a difference in the community in which they live.

Thank you for your support, your gifts and your good hearts. We are honored to serve you, and we are grateful for all the Good Plans that Good People have made through The Catholic Foundation.



**EDWIN M. SCHAFFLER**  
President & CEO

**ROBIN P. HARTMANN**  
Chairman of the Board



“Once upon a time” is a good way to begin a story, and ours is no exception. It was 53 years ago, in fact, that our founders established The Catholic Foundation.

Most memorable tales involve heroes and heroines. Indeed, in the case of The Catholic Foundation, you may be one of them.

And, in the best of our “happily ever after” literature, good values prevail, no matter what the challenges of each chapter. Here again, the Foundation endures today – and will tomorrow – because of the faithful legacies of our donors.

Ours is a wonderful story of Good People making Good Plans that foster Good Works. What makes it a compelling story is the promise it holds – and delivers. The narratives of our donors reveal a powerful common purpose: to build and support The Catholic Foundation to help meet the needs of our Catholic community – even though every donor’s decision is intensely personal, based on his or

## GOOD PLANS

### *Donor Advised Fund*

One of philanthropy’s most popular tools, the Donor Advised Fund provides donors the benefits of a private foundation, while securing the tax advantages and operational efficiencies of a community foundation. Disbursements from the Fund are made in accordance with the donor’s charitable interests and intent.

## GOOD PEOPLE



### **David and Martha Alameel**

David and Martha Alameel owned and operated 22 dental clinics serving the Hispanic community. Married for 37 years, they have a passion for education and are dedicated to giving back to the Hispanic community.

## *Worthy Results*

Through a Donor Advised Fund at The Catholic Foundation, the Alameels help support educational initiatives that enable young members of the Hispanic community to receive a quality education and build better lives for themselves, their families and their communities.



## GOOD PLANS

### *Designated Fund/ Scholarship Fund*

A Designated or Scholarship Fund can be established to provide support for a particular charity over a period of time or in perpetuity, or to establish a scholarship for a qualified student or at a particular school.

## GOOD PEOPLE



### **Roscoe and Ofelia Betz**

Roscoe and Ofelia Betz have been married more than 40 years. One of the factors inspiring their philanthropy was the desire to create a permanent memorial to their daughter, Mary Elizabeth, who was a young nurse at the time of her death.

### *Worthy Results*

The Betzes have established the Mary Elizabeth Betz Memorial Scholarship Fund at The Catholic Foundation, which helps fund Hispanic students aspiring to earn a degree in nursing.



her financial circumstances, family and business responsibilities and experiences, and the most intimate of values.

It is a humble story. The Catholic Foundation, while established during a period of exceptional growth and prosperity, anticipated times of further growth and increased need, times when churches and schools and programs serving people in need might have all they could do to meet the demands of daily operations. Our founders committed to building the the resources necessary to support them. They envisioned a Foundation that, as the “go-to” institution for community-wide support, would help build, renovate and expand parishes and schools, take care of the elderly, keep children in our Catholic schools, and help meet the most basic needs in our community.

These may seem to be pedestrian issues, but to the Catholic community, these are the critical issues which, if not addressed, could stunt its development and cripple its ministries. These are the very issues – the needs of our Catholic community – which

distinguish The Catholic Foundation. The Catholic Foundation – alone in this region – excels at translating the best of charitable instincts into flexible philanthropic tools that can provide the promised support to our Catholic churches and schools and services.

The Catholic Foundation serves the larger community as well – both donors and recipients, Catholics and non-Catholics alike. For The Catholic Foundation, as one of the premier philanthropic enterprises in Dallas is part of the very fabric of the community. As a professionally managed charitable fund, we know the people and the programs of these times in this place, and we can identify both the richest potential and the most profound needs.

And we know Philanthropy. We know how to translate instinctive human generosity – it feels good to give – into meaningful charitable support that is at once effective and efficient. We have developed, with the commitment of our volunteer leaders, professional

## GOOD PLANS

### *Charitable Remainder Trust*

A Charitable Remainder Trust is a particularly flexible way to address post-retirement income needs and tax advantages together with one's ultimate charitable intent. The Foundation staff works with the donor's estate planning professionals to achieve his or her personal goals.

## GOOD PEOPLE



### **Archy Roper**

Archy Roper served as a Trustee of The Catholic Foundation for nine years. He was particularly passionate in his support for Catholic education, utilizing many of the programs available at the Foundation to provide financial assistance for a variety of educational institutions throughout his life and beyond.

### *Worthy Results*

Even after his death, Archy Roper's generosity lives on, particularly through proceeds from the Archy & Jean Roper Charitable Remainder Trust. Proceeds from the Trust will benefit numerous educational institutions within the diocese and have already helped Bishop Lynch High School in Dallas and John Paul II High School in Plano.



## GOOD PLANS

### *Charitable Gift Annuity*

The Charitable Gift Annuity is a donation to The Catholic Foundation in exchange for a guaranteed lifetime income. The donor's gift is added to the Unrestricted Fund to be used for the charitable purposes of the Foundation.

## GOOD PEOPLE



### **Sudie and Gordon Worsham**

Sudie Worsham, retired from the retail fashion industry, and husband Gordon, a retired pediatrician, devote part of their philanthropy to honor their relative John Carence, whose faith touched them. Mr. Carence, who died in 1977, attended Christ the King and was an active member of the Knights of Columbus.

### *Worthy Results*

As a part of their comprehensive philanthropic plan, the Worshams established a Charitable Gift Annuity in John's memory. This arrangement serves as a warm and lasting remembrance of Mr. Carence and honors his legacy of faith. Through the generosity of the Worshams, it will provide enduring support in years to come for a variety of Catholic causes close to Mr. Carence's heart.



counselors, experienced staff, prudent policies, and generous donors a focused Catholic community foundation that accounted for more than \$9.2 million in grants during 2008 to meet the needs of our community.

Given the inherent flexibility and expansive reach of a community foundation, The Catholic Foundation has facilitated gifts of marketable securities, life insurance, IRA benefits, real estate, art, cash, and more that have been used to establish charitable funds that provide support to specific charitable organizations or interests of the donors – everything from universities and child care to education and social services. We can help you tell your story – define your legacy – in any number of meaningful and tax-effective ways.

In the course of our story, someone always asks why The Catholic Foundation is really necessary, why people of faith don't simply give to their own churches and schools and other programs, even to colleges or museums or hospitals, when the



need arises. Many, of course, do. But The Catholic Foundation generates a unique “value-added” benefit to every gift, in addition to providing the very best of philanthropic counsel and stewardship. That added value is every donor’s powerful participation in the Foundation’s mission to help meet all the needs of the Catholic community. It is the growth that is possible in the combining and compounding of the gifts in a simple endowment. And it is the promise that your gift and the support it represents will endure as a source of hope and faith for generations to come.

The Foundation’s expertise also comes into play in this story. If, for example, you were to receive a financial windfall, but did not yet have a fully developed charitable or philanthropic plan, you could make your contribution to The Catholic Foundation, receive the optimum tax advantages for charitable giving, and then work with the Foundation to effect a plan for distributing your gifts over time. If you plan to leave a portion of your estate to charity, you can specify in your will or other estate

## GOOD PLANS

### *Wills/Bequests*

It is easy to give to The Catholic Foundation using your will to designate the Foundation to receive either a specific asset or amount, or as a residuary beneficiary or a contingent beneficiary of your estate. These funds can be used to increase the Unrestricted Fund or to establish a named permanent endowment fund.

## GOOD PEOPLE



### **John Osborne**

John Osborne was a World War II veteran whose multi-faceted career ranged from sales to municipal code enforcement. The holder of two patents, John Osborne was a strong supporter of Catholic causes and Texas A&M University.

### *Worthy Results*

John Osborne shaped his family legacy through his will, which left \$250,000 to the Unrestricted Endowment Fund of The Catholic Foundation. These types of gifts allow the Foundation to continue making grants such as a recent award to help Mary Immaculate Catholic Church build a ministries kitchen.



## GOOD PLANS

### *Life Insurance*

A paid-up life insurance policy irrevocably assigned to The Catholic Foundation and naming the Foundation as a beneficiary can be used, upon maturity, to establish a charitable Fund of any kind.

## GOOD PEOPLE



### **Jere W. Thompson**

Jere W. Thompson has been most generous with his time and talent, having served on the Foundation's Board of Trustees for nine years including two years as Chairman. Today, Jere continues to share his expertise as a member of our Advisory Council and was honored in 2006 as the 24th recipient of The Catholic Foundation Award for his dedication to the Catholic community.

### *Worthy Results*

An important part of Jere Thompson's philanthropic legacy involves a gift of a life insurance policy to The Catholic Foundation, the proceeds of which will continue to support healthcare, research and education at institutions such as Catholic Charities, Cistercian Preparatory School and the University of Dallas.

planning documents that it be given to The Catholic Foundation and distributed, in accordance with your wishes. The ultimate recipients of your generosity – a church, a school, a student on scholarship, a clinic – gets the gift without having to sort through the legal or tax issues of an estate, or concern itself with investment strategies, or even make difficult decisions about when or how to spend the money; The Catholic Foundation takes care of all of that. Even if you wish to leave a significant amount of money to charity when you die, but worry, especially in these times, that you may need the income it generates now, The Catholic Foundation has philanthropic tools that can provide for both. In addition, as the needs of our community change – and they will – The Catholic Foundation will continue to research and consider every grant so that every act of charity you intended is effective and worthy of your vision.

Most of all, as a contributor to the story of The Catholic Foundation, as a donor to the Foundation, you help serve our unique mission to



meet the needs of the Catholic community. This past year, despite the travails of the market, The Catholic Foundation was able to fulfill many commitments because of the good people who have come before us with good plans invested in that mission. We commend their stories to you, as told along the sides of these pages. Today, however, the needs of our community are greater than ever and our investments have been buffeted by the economic uncertainty, so we need to add more stories. We need to build our endowment so that it is available to meet all the needs. We need to help you convert your best charitable instincts into a unique philanthropic plan with purpose.

That's the way it works at The Catholic Foundation: We tell our story; we help you write yours as a philanthropist; and our commitment to serve our community endures.

*Good People. Good Plans.*

*Worthy Results.*

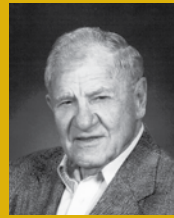
To be continued. With thanks.

## GOOD PLANS

### *Unrestricted Fund*

Gifts of any size can be contributed to the Foundation's Unrestricted Fund, which serves as a perpetual endowment and the primary source of charitable funding for immediate and emerging needs within the Catholic community.

## GOOD PEOPLE

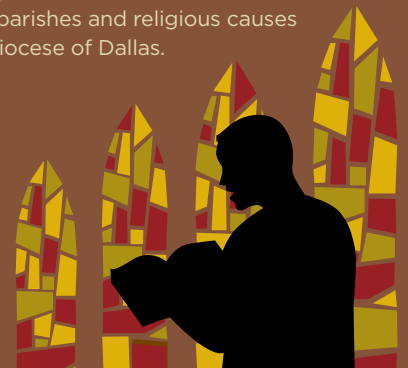


### **Don Krusemark**

Don Krusemark's engineering background and attention to detail serve him well in his passion for supporting priests and promoting religious vocations. For many years, he has provided leadership to organizations including the Serra Club of Metropolitan Dallas and the Parish Vocations Council at St. Rita Catholic Community.

### *Worthy Results*

Through a timely gift from his IRA, Don Krusemark's support of the Unrestricted Fund allows the Foundation to address needs which include support for vocations and seminaries such as Holy Trinity Seminary. Approximately 30% of the grants from The Unrestricted Fund assist parishes and religious causes within the Diocese of Dallas.



## HOW TO BECOME A DONOR

### FIRST

Determine how much you wish to invest in philanthropy now and/or through a simple designation in a will or trust.

### SECOND

Outline your personal philanthropic goals.

### THIRD

Name the fund and name the fund advisors.

### FOURTH

Work with a Catholic Foundation professional to establish investment and spending policies for the fund.

### FIFTH

Make your gift to The Catholic Foundation, and by doing so, you have translated your charitable intentions into a meaningful gift and lasting legacy.

## 2008 UNRESTRICTED AND DISCRETIONARY FUND GRANT RECIPIENTS

### ANNUAL BISHOP'S BURSE - \$35,000

Grant Funding Directed by the Bishop of Dallas

### BIG THOUGHT - \$33,000

Arts Learning Experiences in 6 Diocesan Schools

### BISHOP DUNNE CATHOLIC SCHOOL - \$44,000

Update Fire Alarm System

### CATHOLIC CHARITIES - \$131,423

Senior Citizen Transportation Program, Support of Elderly & Family Assistance Services Division (Funded in Part by the Emma Louise Buhrer Endowment Fund), and Veterans Assistance (Funded from the R. Cardis & Grace DeLee Stubbs Foundation Fund)

### THE CATHOLIC FOUNDATION AWARD GRANT - \$10,000

Grant to Catholic Charities Designated by The Catholic Foundation Award Honoree

### THE CATHOLIC FOUNDATION HIGH SCHOOL SCHOLARSHIP PROGRAM - \$60,000

Scholarships for Students Attending Diocesan High Schools (Funded in Part by the Catherine O'Connell & Charles Schulze Scholarship Fund)

### THE CATHOLIC FOUNDATION SCHOLARS AWARD - \$8,000

Scholarships for Scholars Award Winner and Runners-up

### CHILDREN'S EDUCATION FUND - \$50,000

Catholic School Tuition Assistance

### CHRISTIAN COMMUNITY ACTION - \$5,597

"Kids Eat Free" Summer Lunch Program (Funded in Part by the Jane & Henry Neuhoff Fund)

### DALLAS CHILDREN'S THEATER - \$7,500

Matinee Performances for Students in 3 Diocesan Schools

### DIOCESAN MINISTRY TO PERSONS WITH DISABILITIES - \$30,000

Automatic Door Openers in Selected Parishes (Funded from the Senior Citizens Fund)

### EMERGENCY FUNDS AND TUITION ASSISTANCE - \$29,821

(Funded from the Emma Louise Buhrer Endowment Fund and the Catherine O'Connell & Charles Schulze Scholarship Fund)

### GRAND PRAIRIE WELLNESS CENTER - \$5,617

Technology & Training Plan (Funded by the R. Cardis & Grace DeLee Stubbs Foundation Fund)

### GUADALUPE RADIO NETWORK - \$20,000

Purchase & Installation of Updated Broadcasting Equipment

### THE HIGHLANDS SCHOOL - \$35,000

Access & Road Improvement Project

### HOLY FAMILY OF NAZARETH PARISH - \$45,000

Replace HVAC System & Restroom Renovations

### IMMACULATE CONCEPTION SCHOOL (GRAND PRAIRIE) - \$57,450

Replace Computers & Update Technology

### JOHN PAUL II HIGH SCHOOL - \$25,000

Redesign Website

### LITERACY INSTRUCTION FOR TEXAS - \$10,925

ESL Instruction in Parishes

### MARY IMMACULATE CATHOLIC CHURCH - \$40,000

Building of Ministries Kitchen

### MUSEUM OF NATURE & SCIENCE - \$9,900

Science Education Programs in 12 Diocesan Schools

### NOTRE DAME SCHOOL OF DALLAS - \$10,000

Update Computers & Software

### OUR LADY OF ANGELS PARISH - \$45,000

Salary Assistance for Creation of the Position of an Adult Faith Formation Coordinator

### OUR LADY OF PERPETUAL HELP SCHOOL - \$35,000

Correct Foundation & Drainage Problems

### THE PINES CATHOLIC CAMP - \$25,000

Master Plan for Camp

### SACRED HEART OF JESUS CHINESE PARISH - \$40,000

Construction of Multi-Purpose Building to Include a Parish Hall & Rectory

### ST. AUGUSTINE CATHOLIC SCHOOL - \$60,000

Replace Roof & Floor in Gym Facility

### ST. EDWARD CATHOLIC CHURCH - \$18,000

Replace Windows in Rectory & Office Building

### ST. ELIZABETH OF HUNGARY SCHOOL - \$35,000

Update Technology Labs

### ST. FRANCIS CATHOLIC CHURCH (LANCASTER) - \$10,000

Clerestory Windows for New Chapel

### ST. JOHN PARISH (ENNIS) - \$20,000

Update of Parish Technology and Computers

### ST. JOSEPH'S RESIDENCE - \$480,000

Building Renovations and Endowment (Funded from the Victoria & Leon Gulczynski Memorial Endowment Fund and Jane & Henry Neuhoff Fund)

### ST. LUKE CATHOLIC CHURCH - \$65,625

Parking Lot Repairs & Maintenance and Salary Assistance for Reading Resource Teacher

### ST. MARY'S PARISH (SHERMAN) - \$45,000

Purchase Pews for New Parish Church

### ST. MARY OF CARMEL SCHOOL - \$54,424

New Roof & Installation of Video Surveillance Equipment

### ST. MONICA SCHOOL - \$30,000

Update Middle School Science Labs

### ST. PATRICK CATHOLIC CHURCH - \$16,400

Refugee Outreach Program (Funded from the Jane & Henry Neuhoff Fund)

### ST. PAUL THE APOSTLE SCHOOL - \$30,000

Athletic Field, Outdoor Pavilion & Benches

### ST. THOMAS AQUINAS SCHOOL - \$25,000

Renovation of Upper School Restrooms

### UNIVERSITY OF DALLAS - \$25,000

New Science Laboratory Exhaust Fans

### URSULINE ACADEMY - \$50,000

Assistance with Construction of French Family Science, Math & Technology Center

### VITAE CARING FOUNDATION - \$10,000

Pro-Life TV Ad Campaign in DFW Market

### WORK OF HEART AWARD PROGRAM - \$50,000

2008-2009 Awards (Funded in Part by the Emma Louise Buhrer Endowment Fund)

*Additionally, more than \$6.8 million was granted from Donor Advised and Designated Funds, for a total of \$9 million granted by The Catholic Foundation in 2008.*

## STATEMENT OF FINANCIAL POSITION

December 31, 2008  
 (with summarized financial information  
 as of December 31, 2007)

	2008	2007
<b>Assets</b>		
Cash and cash equivalents	\$ 347,223	\$ 63,721
Accounts receivable	186,483	511,700
Contributions receivable	4,862,000	67,250
Investments	56,427,106	81,936,438
Agency funds	29,376,551	40,067,140
Real estate held for investments	1,017,531	1,017,531
Other assets	1,017,645	1,008,864
	<hr/>	<hr/>
Total assets	93,234,539	124,672,644
<b>Liabilities and net assets</b>		
Liabilities		
Accounts payable and accrued liabilities	296,198	259,247
Distributions payable	89,214	114,340
Grants payable	1,726,427	1,756,859
Liability to trust beneficiaries	2,391,301	3,016,275
Agency funds	29,376,551	40,067,140
Deferred revenue	3,361,364	5,884,407
Annuities payable	2,663,367	2,190,650
	<hr/>	<hr/>
Total liabilities	39,904,422	53,288,918
Net assets		
Unrestricted	13,516,363	27,206,993
Temporarily restricted	16,096,021	24,381,945
Permanently restricted	23,717,733	19,794,788
	<hr/>	<hr/>
Total net assets	\$ 53,330,117	\$ 71,383,726
Total liabilities and net assets	\$ 93,234,539	\$ 124,672,644
	<hr/>	<hr/>

To see a full copy of our audited financial statements, please visit us at [www.catholicfoundation.com](http://www.catholicfoundation.com)

## STATEMENT OF ACTIVITIES

Year ended December 31, 2008  
(with summarized financial information  
for the year ended December 31, 2007)

	Unrestricted	Temporarily restricted	Permanently restricted	2008 Total	2007 Total
<b>Revenue, gains (losses), and other support</b>					
Contributions	\$ 5,763,350	\$ 2,008,501	\$ 4,485,724	\$ 12,257,575	\$ 3,862,002
Investment income					
Dividends and interest	628,832	1,421,211	59,190	2,109,233	1,923,985
Net realized and unrealized gains (losses) on investments	(17,354,454)	(6,149,706)	(497,464)	(24,001,624)	4,799,711
Real estate income	11,965	-	-	11,965	13,388
Investment advisory fees	361,938	-	-	361,938	442,977
Other	19,884	1,246	-	21,130	214,138
Change in value of split-interest agreements	26,012	2,780,680	470,462	3,277,154	628,875
Net assets released from restrictions	8,942,823	(8,942,823)	-	-	-
<b>Total revenue, gains (losses), and other support</b>	<b>(1,599,650)</b>	<b>(8,880,891)</b>	<b>4,517,912</b>	<b>(5,962,629)</b>	<b>11,885,076</b>
<b>Expenses</b>					
Grants	1,162,748	-	-	1,162,748	1,356,529
Distributions	8,177,817	-	-	8,177,817	3,642,356
Annuity payments and distributions to beneficiaries	531,168	-	-	531,168	592,537
Development	858,538	-	-	858,538	822,563
Management and general	1,360,709	-	-	1,360,709	1,334,496
<b>Total expenses</b>	<b>12,090,980</b>	<b>-</b>	<b>-</b>	<b>12,090,980</b>	<b>7,748,481</b>
Transfers between funds	-	594,967	(594,967)	-	-
Change in net assets	(13,690,630)	(8,285,924)	3,922,945	(18,053,609)	4,136,595
Net assets at beginning of year	27,206,993	24,381,945	19,794,788	71,383,726	67,247,131
Net assets at end of year	\$ 13,516,363	\$ 16,096,021	\$ 23,717,733	\$ 53,330,117	\$ 71,383,726

To see a full copy of our audited financial statements, please visit us at [www.catholicfoundation.com](http://www.catholicfoundation.com)

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O.D. (Dan) Cruse

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