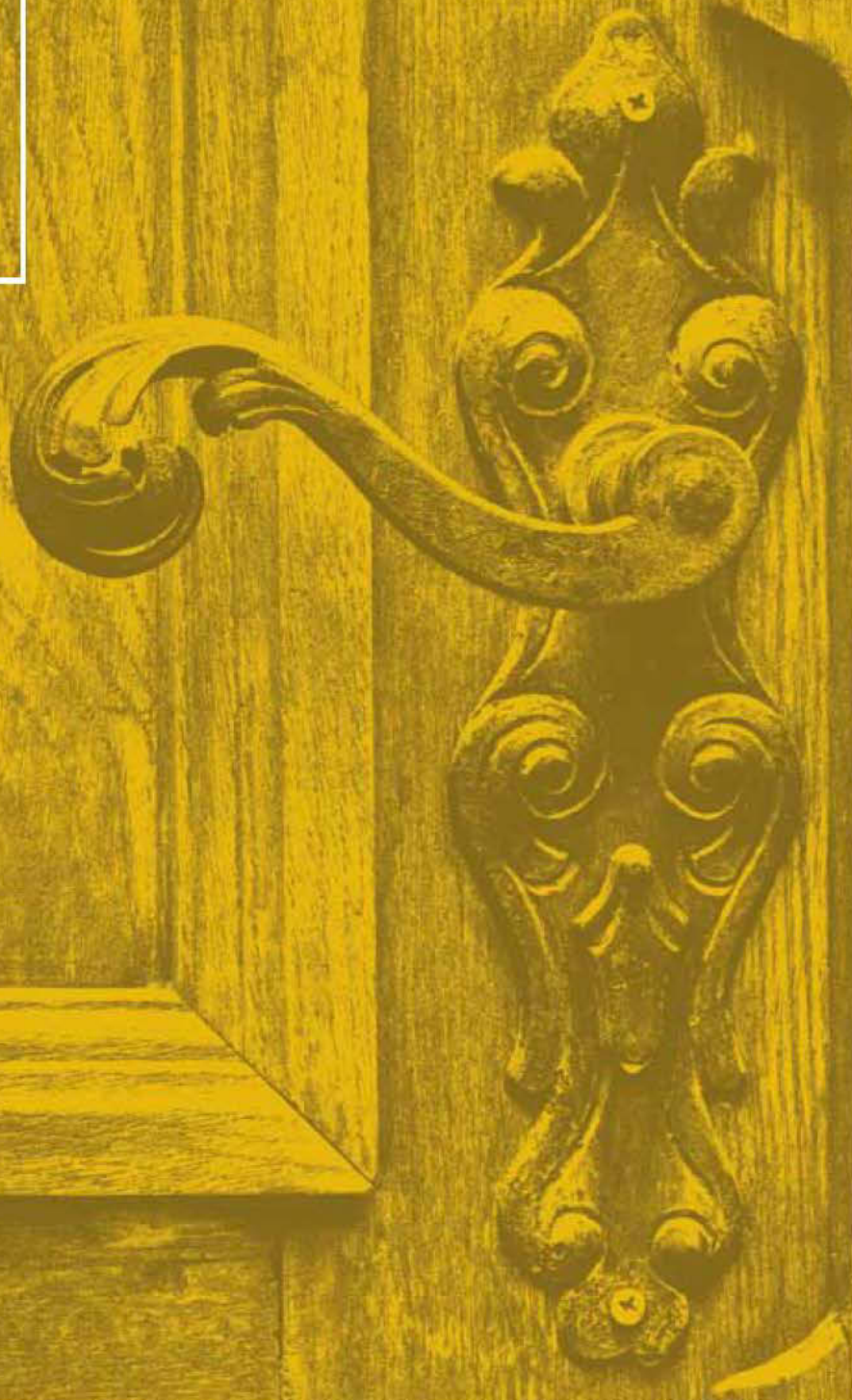


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ANNUAL  
REPORT



THE CATHOLIC FOUNDATION



## MISSION

*The Catholic Foundation promotes compassionate charitable giving and stewardship that serves donors and the needs of our community.*



# Welcome

For nearly 60 years, The Catholic Foundation has responded to the call of donors dedicated to making a difference in the Diocese of Dallas and beyond.

In more than 350 funds, we manage over \$140 million in assets. In 2012 alone, we awarded \$4.7 million in grants to worthy religious, educational and charitable groups.

Our doors are open to all donors.

No matter where you are in your life's path, no matter the amount you have to give, we can offer you a doorway to giving and to making a positive difference in alignment with your interests and your beliefs.

What's the best way for you to give? In this year's report, we'll look at three questions prospective donors often ask, three key doorways to giving, and some of the donors who have used The Catholic Foundation as a means to meeting our community's needs.



## DEAR FRIENDS,

### A LETTER FROM THE CHAIRMAN

Last year was a productive year for The Catholic Foundation. Not only did your Foundation have a successful year thanks to generous donors and outstanding grant recipients, but we saw the transition of our leadership. Following fifteen years of vision and growth, Ed Schaffler retired on December 31, 2012.

On behalf of the Trustees, I thank Ed for his dedication and successes and wish Ed, Jane and their family health and happiness in the years to come.

Matt Kramer assumed the presidency on January 1, 2013 and quickly began building relationships with all our constituents – donors, trustees, staff and diocesan organizations. We look forward to Matt's leadership.

In this annual report we are pleased to share with you the financial results for 2012. Contributions increased to \$8.5 million compared to \$5.8 million in 2011. Investment returns on our unrestricted Philanthropy Fund were at 12.5 percent and \$4.7 million was granted into our community.

The Catholic Foundation is your Foundation. We are so grateful and appreciative to all of you for your continued support of The Catholic Foundation.



**Thomas W. Codd, Jr.**  
Chairman

### A LETTER FROM THE PRESIDENT AND CEO

It has been my pleasure during the first few months as president of The Catholic Foundation to see first-hand that The Catholic Foundation is truly a gem, investing resources throughout our Catholic community. As the new president, I understand and respect the legacy that I have been handed.

One of the Foundation's goals is to continue the message of how easy and beneficial it is to use The Catholic Foundation for all your charitable and longer term giving. So I'd like to share with you some of what I've learned.

The Catholic Foundation is a community foundation that serves as a vehicle for many generous donors to make their philanthropic visions a reality. It is an independent public charity managed by a professional staff and while not part of the Diocese of Dallas the Bishop serves on our governing Board of Trustees which is comprised of Catholic business and civic leaders who give freely of their time and expertise.

Twice a year distributions are made by the board of trustees from our Philanthropy Fund, which is an unrestricted endowment fund, to various parishes, schools and organizations within the Dallas Diocese serving a Catholic population. Grants are also awarded year-round from Donor Advised funds that support many Catholic and non-Catholic organizations that are aligned with Catholic values in our community and beyond.

As you may have noticed, we have re-christened our Unrestricted Fund as the Philanthropy Fund. It's part of our efforts to raise the profile of this important function of The Catholic Foundation. We do welcome one-time gifts to the Philanthropy Fund as a way for many donors to participate in the good works of the Foundation.

To our existing donors, we are most appreciative for your generosity and vision in supporting a myriad of charitable organizations and endeavors. For all potential donors, if you regularly donate to your parish, school and/or favorite charity, please reach out to us to learn how you can establish a fund at the Foundation.

The Catholic Foundation belongs to you. We are proud to serve donors whose gifts are both large and small. Each gift is meaningful and will enable the Foundation to respond to the needs of people, churches, schools, institutions and the whole of the community not only today but for all time. A true community works together to serve one another.

You are part of our community, and we are so grateful that you are.



**J. Matthew Kramer**  
President and Chief Executive Officer

In 1955, a visionary group of lay Catholic leaders in the Dallas business and professional community established The Catholic Foundation to ensure that the spiritual and physical needs of the less fortunate in the community were addressed. Over the decades, The Catholic Foundation has positively impacted virtually every Catholic institution in the Diocese of Dallas, as well as many other area social service agencies, cultural, educational and health care organizations.

The Catholic Foundation is an independent community foundation. A 501(c)(3) public charity, we are a permanent and growing endowment built by the gifts of hundreds of individuals and organizations whose uniquely Catholic philanthropy has shaped and expanded our Christian response to the needs of an ever-changing society and its people.

## OUR DONORS COUNT ON THE CATHOLIC FOUNDATION FOR:

### **FLEXIBILITY**

We offer the flexibility to let you give in the way that is most convenient and most advantageous to your financial situation, whether it's writing a check or having us work closely with you and your financial advisors to create a philanthropic program that aligns with your estate planning goals and your philanthropic vision.

### **EXPERTISE**

Our nearly 60 years' experience in identifying and addressing existing and emerging community needs gives us the expertise to carry out your philanthropic plans with grants to the people, programs and institutions that will produce the most positive results.

### **RELIABILITY**

We are governed by a volunteer board of trustees who are respected leaders in our community. We provide careful stewardship of your monies, compliance with all relevant regulations and oversight of the effectiveness of your gifts. Our funds are professionally managed, carefully monitored, and independently audited. The Catholic Foundation is committed to prudent investment strategies that our trustees believe will lead to the optimal use of your funds in the charitable community.



Doorway to Giving:  
**THE PHILANTHROPY FUND**

You want to give what you can. But why should you write a check to The Catholic Foundation and not one directly to a charity?

A gift to The Catholic Foundation's Philanthropy Fund maximizes the impact of your philanthropy and will get your gift where it's needed most. For nearly 60 years, we have been deeply involved in identifying the most pressing needs of our community and in supporting the organizations that can respond to them. Your gift of any size adds to a significant fund that helps support churches, schools and nonprofit groups in need. The Foundation's trustees determine where the gift will do the most good, both in the present and in the future.





A Texas native, Bertha Moreno has been a devoted volunteer for Catholic and community causes for decades. She and her husband Herbert, a Korean War veteran, raised nine children, all of whom attended Bishop Dunne Catholic School. A Registered Nurse, Bertha has worked in many parishes and at the Low Birth Weight Development Center in Dallas. While there, she learned firsthand about the impact of unrestricted gifts. "With those gifts," Bertha says, "you could pay for water, for electricity, for whatever you really needed." So after Herbert passed away, she decided to make a generous gift to

The Catholic Foundation's unrestricted Philanthropy Fund. "I am not a wealthy person by any stretch. But I have enough pennies and enough kids to take care of me. I knew with an unrestricted gift The Catholic Foundation would get the funds to the people in the schools, churches and nonprofits who run the organizations. They know what these organizations need. They know where it will do most good."



Doorway to Giving:  
**DONOR ADVISED FUND**

You give a significant amount already.  
But is there a better way to do it?

Offering optimal flexibility, a Donor Advised Fund is not dissimilar to a private or family foundation, but with significant tax advantages and considerably less complexity because it exists as part of a community foundation.

Contributions to – and distributions from – the fund can be made at any time in any amount. We work closely with you to support the causes and organizations most important to you. This vehicle for giving can be especially useful when you need to realize the benefits of a charitable tax deduction in a single year, while establishing a philanthropic program that extends over several years.





Long-time philanthropists and parishioners of St. Rita Catholic Church in North Dallas, Ed and Kathy Ramirez believe strongly in helping people in need. Ed is a retired CPA and financial executive for a large Canadian oil company. Kathy is a retired teacher who taught at Mary Immaculate Catholic School for eight years. She volunteers for organizations including Serra Club and Meals on Wheels. They originally had a Donor Advised Fund at a large national bank. "But most of our causes were Catholic- and community-related," Ed says. "So transferring to The Catholic Foundation made sense. They're

here. We know them. They know the community. They react quickly. Now it's all much easier. All I have to do is pick up the phone." Adds Kathy: "We have so many blessings to thank God for. We really want to give back." Through their fund, they support both Catholic and non-Catholic causes, including Montserrat Jesuit Retreat House and the Parkland Foundation (Ed serves on both boards).



Doorway to Giving:  
**PLANNED GIVING**

You've been giving to your parish for decades.  
But who's going to support your priorities  
after you're gone?

With a planned gift, you can continue to support causes and organizations you're passionate about and create a lasting legacy. Planned Giving through The Catholic Foundation uses gifts from your estate to fulfill your philanthropic vision in accordance with specific plans we make with you or you and your professional advisor. Vehicles include: Wills or Living Trusts, Charitable Remainder Trusts, Charitable Lead Trusts, Charitable IRAs, Charitable Gift Annuities, Life Insurance Policies and Life Estates. Instruments can be simple, or sophisticated enough to provide for an array of commitments to family, businesses, and charitable institutions.





Monica and Mark Wischmeyer are long-time Catholic Foundation donors and members of St. Rita Catholic Church in North Dallas. Mark is an executive who recently sold his employee benefits firm to Gallagher Benefit Services. Monica is a bilingual speech-language pathologist. They have been married 23 years and have three children. When they were doing their estate planning, the Wischmeyers were inspired to act as though they had one additional child. "We decided to treat The Catholic Foundation as our fourth kid," Mark says. "Through our will, we are leaving a quarter of our estate to

the Foundation." Why? "Because we've been blessed and there are so many people in need. We know The Catholic Foundation understands the needs of the community."

The Wischmeyers are particularly passionate about helping equalize educational opportunities throughout Dallas, and they have supported many area schools, including St. Mary of Carmel School in West Dallas. "After we're gone, we want to continue to help others."

## HOW TO BECOME A DONOR

Are you ready to realize your philanthropic intentions? Here are the basic steps The Catholic Foundation will guide you through:

1

Outline your personal philanthropic goals.

2

Determine how much you wish to invest in philanthropy. Decide what you want to give now, in a gift to the Foundation's unrestricted Philanthropy Fund, to a Donor Advised Fund or Charitable Trust, and/or later, through a simple designation in a will or trust to establish a named charitable fund at the Foundation.

3


Name the fund and name the fund advisors.

4

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

5

Establish your fund with an initial gift and/or translate your charitable intentions into a lasting legacy through your will or trust.



Let's begin the conversation.  
Call 972.661.9792 or email  
[info@catholicfoundation.com](mailto:info@catholicfoundation.com).



## 2012 GRANTS

On behalf of our donors, The Catholic Foundation awards grants in three main areas.

65.4%  
EDUCATIONAL CAUSES



22.7%  
RELIGIOUS CAUSES



11.9%  
CHARITABLE CAUSES



65.4% of our grants in 2012 went to educational causes, including grants to Big Thought for enrichment programming and to Holy Family of Nazareth Catholic School, St. Philip the Apostle Catholic School and St. Augustine Catholic School to enhance technology in the classroom.

22.7% of our grants in 2012 went to support religious causes, including repairs and renovations at Our Lady of Perpetual Help Catholic Church, St. Monica Church, the Mount Carmel Center and the Montserrat Jesuit Retreat House.

11.9% of our grants in 2012 were awarded to charitable causes, including funds for a truck to be used by the Food Pantry at St. Bernard of Clairvaux Catholic Church in East Dallas and Catholic Charities for relocation cost of the Brady Center.

In 2012, The Catholic Foundation awarded more than \$4.7 million in grants from our unrestricted Philanthropy Fund, Restricted Funds, and Donor Advised Funds.



1.2 million | THE PHILANTHROPY FUND

3.5 million | RESTRICTED AND DONOR ADVISED FUNDS

4.7 million

## STATEMENTS OF FINANCIAL POSITION

December 31, 2012  
(with comparative amounts  
as of December 31, 2011)

<b>Assets</b>	<b>2012</b>	<b>2011</b>
Cash and cash equivalents	\$ 1,091,369	\$ 2,659,842
Accounts and trade receivable	703,710	408,140
Receivable from fund manager	95,402	1,373,137
Contributions receivable	-	100,000
Investments	90,133,391	81,258,196
Agency funds	42,926,243	35,786,905
Real estate held for investment	3,300,031	1,104,559
Other assets	<u>407,975</u>	<u>491,932</u>
Total assets	<u>\$ 138,658,121</u>	<u>\$ 123,182,711</u>
<b>Liabilities and net assets</b>		
Liabilities		
Accounts payable and accrued liabilities	\$ 640,090	\$ 1,880,833
Distributions payable	54,670	60,019
Grants payable	1,409,088	1,354,224
Liability to trust beneficiaries	3,008,428	2,908,957
Agency funds	42,926,243	35,786,905
Deferred revenue	4,327,769	4,280,235
Annuities payable	<u>5,276,277</u>	<u>5,345,379</u>
Total liabilities	57,642,565	51,616,552
Net assets		
Unrestricted	26,501,880	23,919,027
Temporarily restricted	26,646,357	20,164,416
Permanently restricted	<u>27,867,319</u>	<u>27,482,716</u>
Total net assets	<u>81,015,556</u>	<u>71,566,159</u>
Total liabilities and net assets	<u>\$ 138,658,121</u>	<u>\$ 123,182,711</u>

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



## STATEMENTS OF ACTIVITIES

Year ended December 31, 2012  
(with summarized financial information  
for the year ended December 31, 2011)

	<u>Unrestricted</u>	<u>Temporarily restricted</u>	<u>Permanently restricted</u>	<u>2012 Total</u>	<u>2011 Total</u>
<b>Revenue, gains (losses), and other support</b>					
Contributions	\$ 706,443	\$ 7,645,383	\$ 138,868	\$ 8,490,694	\$ 5,860,179
Investment income					
Dividends and interest	377,892	1,072,995	5,030	1,455,917	1,365,368
Net realized and unrealized gains (losses) on investments	4,491,002	2,522,494	158,782	7,172,278	(1,141,492)
Real estate income	11,965	5,681	-	17,646	44,860
Investment advisory fees	469,490	-	-	469,490	417,109
Other	300,743	8,774	-	309,517	195,110
Change in value of split-interest agreements	(128,743)	(66,813)	(41,074)	(236,630)	33,937
Net assets released from restrictions	<u>4,583,576</u>	<u>(4,583,576)</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>Total revenue, gains (losses), and other support</b>	<b>\$ 10,812,368</b>	<b>\$ 6,604,938</b>	<b>\$ 261,606</b>	<b>\$ 17,678,912</b>	<b>\$ 6,775,071</b>
<b>Expenses</b>					
Grants	1,243,242	-	-	1,243,242	1,239,575
Distributions	3,503,769	-	-	3,503,769	3,215,862
Annuity payments and distributions to beneficiaries	797,340	-	-	797,340	793,869
Development	938,549	-	-	938,549	810,610
Management and general	1,746,615	-	-	1,746,615	1,449,743
<b>Total expenses</b>	<b><u>8,229,515</u></b>	<b><u>-</u></b>	<b><u>-</u></b>	<b><u>8,229,515</u></b>	<b><u>7,509,659</u></b>
Transfers between funds	-	(122,997)	122,997	-	-
Change in net assets	2,582,853	6,481,941	384,603	9,449,397	(734,588)
<b>Net assets at beginning of year</b>	<b><u>23,919,027</u></b>	<b><u>20,164,416</u></b>	<b><u>27,482,716</u></b>	<b><u>71,566,159</u></b>	<b><u>72,300,747</u></b>
<b>Net assets at end of year</b>	<b><u>\$ 26,501,880</u></b>	<b><u>\$ 26,646,357</u></b>	<b><u>\$ 27,867,319</u></b>	<b><u>\$ 81,015,556</u></b>	<b><u>\$ 71,566,159</u></b>

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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R. Michael George, CFRE  
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\* Former Chairman of the Board

• Founder

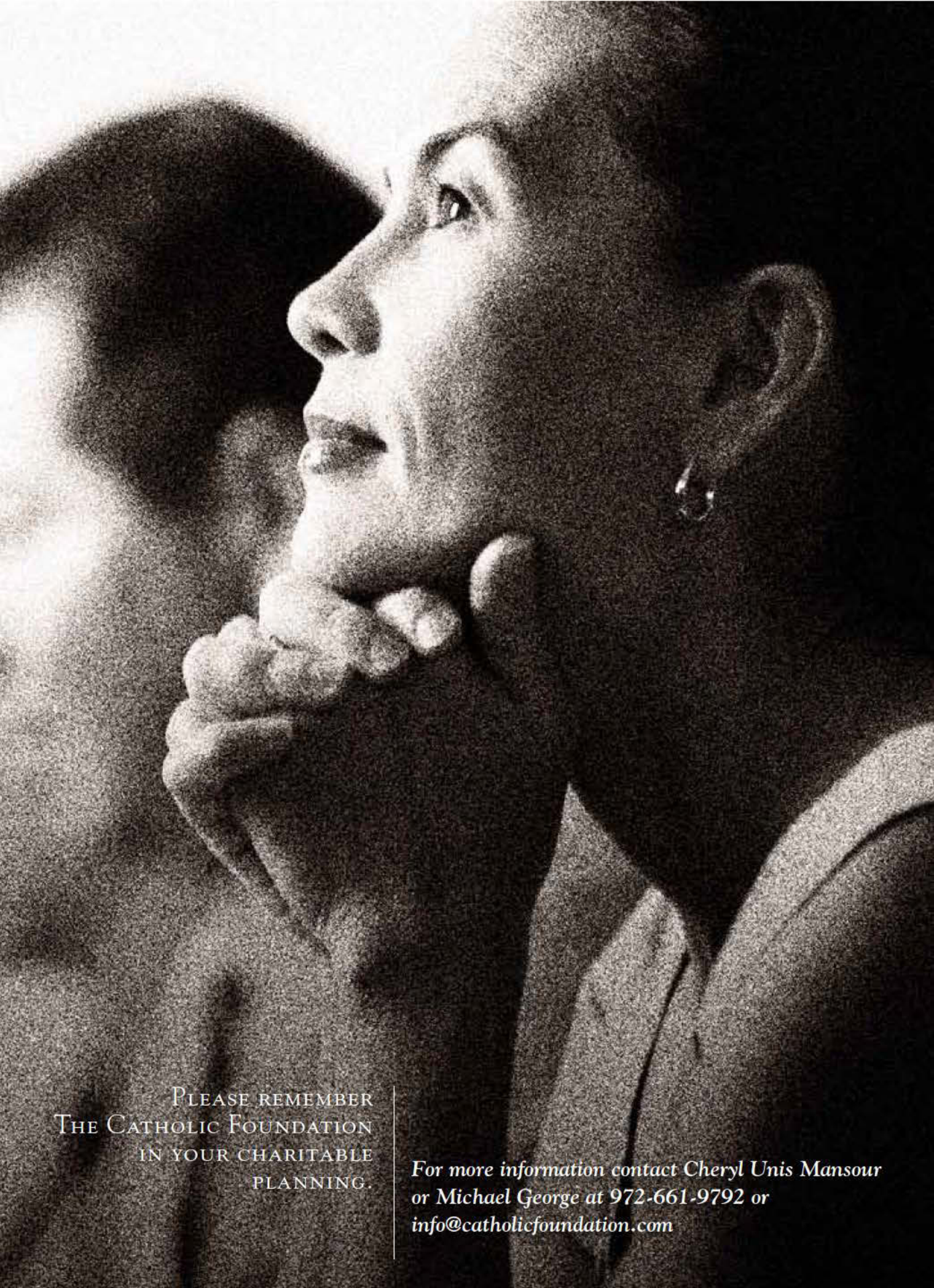
## LEGACY CIRCLE

*In late 2009 The Catholic Foundation Legacy Circle was created to honor the individuals and families that have made long term commitments to the Foundation, and we are deeply grateful for their trust and shared charitable vision.*

Anonymous Members (11)	Mauricio & Maria Delgado	Agnes Anne Kelleher+	Velma Roland+
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Leo & Wilma Danze	Paul & Lorraine Kaiser+		
	Msgr. Raphael Kamel+		
	Ursula Kaufman+		

+Deceased





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*For more information contact Cheryl Unis Mansour  
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