

60

THINGS

*you didn't know about
The Catholic Foundation*



1. WE'RE 60!

In 2015, The Catholic Foundation marked its 60th year of helping donors make a difference in our Catholic community and beyond. Over the course of six decades we've been devoted to significantly impacting communities and helping donors fulfill their charitable goals.

And here's 59 other things you may not have known about The Catholic Foundation. ❖



2.



We are a lay organization.

In 1955, a visionary group of lay Catholic leaders in the Dallas business and professional community established The Catholic Foundation to help address the spiritual and physical needs of the less fortunate in our community.

4.



We manage more than \$223 million in assets in more than 390 charitable funds and trusts.



5.

We support the causes, both Catholic and non-Catholic, most important to our donors.

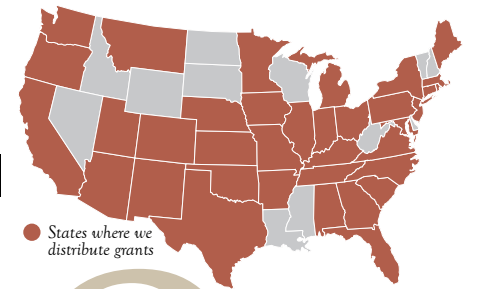
3.



Over the last 40 years, we have awarded more than \$100 million in grants to religious, charitable and educational organizations.

6.

We distribute grants throughout the country and our local community.



States where we distribute grants

7.



In 2015, The Catholic Foundation awarded more than \$15 million through more than 1,300 grants.

8.



More than 500 different organizations, from local to global, received grants from The Catholic Foundation in 2015.



9.

We offer planned giving expertise to every Catholic organization in the Dallas community through our Organization Endowment Program.

10.

We receive, invest and distribute funds from the Our Faith Our Future Capital Campaign.

11.



The Catholic Foundation distributes grants from funds established by donors, as well as discretionary funds like the unrestricted Philanthropy Fund, from which grants are awarded to serve the ever-changing needs of the local Catholic community.



Our Funds include:

- 12. The Philanthropy Fund
- 13. Donor Advised Funds
- 14. Designated Funds
- 15. Field of Interest Funds
- 16. Scholarship Funds
- 17. Memorial Funds
- 18. Support Organizations

Gifts you can give The Catholic Foundation include:

- 19. Cash
- 20. Appreciated Securities
- 21. Closely Held Stock
- 22. Real Estate
- 23. Tangible Personal Property
- 24. Oil, Mineral and Royalty Interests
- 25. Intellectual Property Rights
- 26. Life Insurance
- 27. Mutual Funds
- 28. Qualified Retirement Plan Assets

29. We were the first Catholic Foundation in the nation.

Events

Every year, we host, present or sponsor:

- 30. Catholic Community Network
- 31. Professional Advisors Series
- 32. Work of Heart Awards
- 33. The Catholic Foundation Award Dinner
- 34. The Catholic Foundation Scholar Award
- 35. Art Competition in TCF Plaza
- 36. The Catholic Foundation Award

Constituencies

- 37. Our Advisory Council increases our visibility in the community.
- 38. We collaborate with other foundations.
- 39. We are governed by a lay Board of Trustees.
- 40. We can work closely with your professional advisors.
- 41. We assist priests with their personal charitable giving.

Service

- 42. We have a longstanding, experienced, committed staff to serve you.
- 43. We are an independent charitable organization.
- 44. We offer dedicated personal service.

59. You can click on any of these 60 items for more info on the digital version of this report at catholicfoundation.com.

60.

We have a new home.
12222 Merit Drive,
Suite 850, Dallas, Texas.

Get in touch, ask us how you can make a difference.

- 45. We honor and carry out our donors' intentions.
- 46. We partner with donors and charitable nonprofits.
- 47. We preserve the philanthropic legacies of our donors.
- 48. We provide professional investment oversight.
- 49. We serve our community's educational, charitable and religious needs.
- 50. You can count on us for due diligence on grant recipients.
- 51. We recognize our community's ever-changing needs.
- 52. We preserve our founders' original vision.
- 53. We support local Catholic schools.

Donor Support

- 54. We educate donors on impactful giving.
- 55. We deliver faithful stewardship of donor gifts.
- 56. We build strong relationships with donors.
- 57. We offer a type of Donor Advised Fund without fees.
- 58. Our Legacy Circle honors donors who have made long-term commitments to The Catholic Foundation.



DEAR FRIENDS,

Sixty years of giving, sixty years of impact, sixty years of stewardship. We are proud to carry on the work started sixty years ago by Bishop Gorman, Ed Maher and Tom Unis. We would not be here today without the generosity of all the donors who have given 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 appreciate the work of all our former and current trustees and employees to help direct and execute the mission of the Foundation.

During 2015, the Foundation grew from \$203 million to more than \$223 million in assets under management. Contributions to The Catholic Foundation increased from nearly \$45 million in 2014 to more than \$53 million in 2015. In 2014, the Foundation granted more than \$12 million into the community, while 2015 grants increased to \$15.36 million. We made more than 1,300 grants in 2015 to more than 505 unique organizations here in the Dallas area and across the United States.

In 2013, Bishop Farrell established a Designated Fund at the Foundation for the Our Faith – Our Future Capital Campaign. The Diocese has completed the solicitation phase of the campaign, as did eight other parishes with combined campaign funds at The Catholic Foundation. Fulfillment of pledges will continue for the next several years with the Foundation receiving, investing and distributing the funds committed to the capital campaign.

We kicked off our parish and organizational endowment program in 2015. This program provides parishes, schools and Catholic organizations all the tools and information necessary to establish a planned giving program. This is a great vehicle for organizations to secure future gifts from their current donors to ensure the next generation receives similar benefits. Over the next four years, we plan to meet with and present these materials to every Catholic organization in our nine-county Catholic community.

Giving through The Catholic Foundation not only benefits donors' favorite charities, but increases their community impact. Modest fees or investment income earned from all funds go into our discretionary Philanthropy Fund. Grant distributions from the Philanthropy Fund help our Catholic community with urgent and ever-changing needs each fall and spring. The more donors who give through the Foundation, the greater the benefit to our local Catholic community.

For those who have not yet established a charitable fund – please consider making your lifetime charitable gifts through The Catholic Foundation. Collectively, we can make a greater impact in our community today and provide resources for the future. For those of you contemplating your estate plan, count on The Catholic Foundation to help guide you through the process and assist you in establishing your charitable legacy.

On behalf of the entire Board and staff, we appreciate your confidence in The Catholic Foundation to serve you and carry out your charitable intentions. Your trust in us has yielded another very positive and promising report on The Catholic Foundation for 2015.



Victoria P. Lattner
Chairman



J. Matthew Kramer
President and Chief Executive Officer

60 Years of Donors

Leaving A Legacy

1955

Founded in 1955 as the first Catholic Foundation in the country.

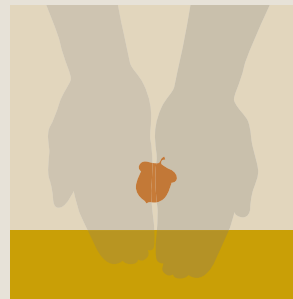


The Foundation of the Roman Catholic Diocese of Dallas-Ft. Worth was founded by Bishop Thomas K. Gorman, Edward R. Maher and Thomas C. Unis.

Pictured (l to r): Edward R. Maher, Bishop Gorman, and Thomas C. Unis

1965

Made first Philanthropy Fund grant for **\$10,543.**



1972

Received James Simmons' \$2.6 million gift.



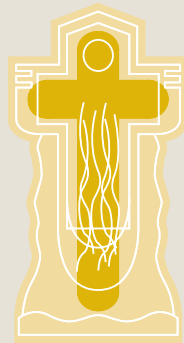
1980

Surpassed \$100,000 in annual grants in 1980.

\$100K

1983

Presented first Catholic Foundation Award.



Surpassed the million-dollar mark in grants awarded.

\$1M

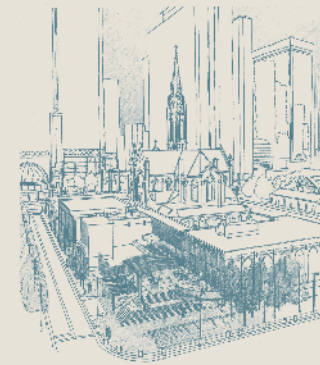
1991

Awarded first \$1M grant to **Next Generation Campaign.**



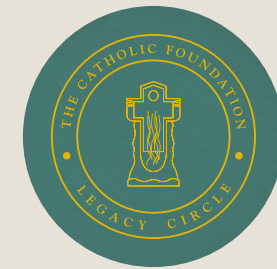
2005

Celebrated 50th anniversary.



2006

Dedicated Catholic Foundation Art Plaza.



2009

Established Legacy Circle to honor donors.

2013

Created Our Faith, Our Future Campaign Fund for Diocese of Dallas.



2015

Initiated Organizational Endowment Program.

Surpassed **\$100 million** in grants in the history of the Foundation.

\$100M

STATEMENTS OF FINANCIAL POSITION

December 31, 2015
(with comparative amounts
as of December 31, 2014)

Assets	2015	2014
Cash and cash equivalents	\$ 4,558,300	\$ 1,156,523
Accounts and trade receivable	296,446	516,087
Receivable from fund manager	-	2,259,251
Pledges receivable, net	37,243,579	30,295,111
Beneficial interest in trusts held by others	1,995,633	2,313,135
Investments	129,105,268	118,442,706
Agency funds	45,424,393	43,582,191
Real estate held for investment	3,641,031	3,408,031
Other assets	844,774	568,729
Total assets	<u>\$ 223,109,424</u>	<u>\$ 202,541,764</u>
Liabilities and net assets		
Liabilities		
Accounts payable and accrued liabilities	\$ 2,129,691	\$ 574,553
Distributions payable	61,050	61,473
Grants payable	1,495,408	1,569,077
Liability to trust beneficiaries	3,261,026	3,469,747
Agency funds	45,424,393	43,582,191
Deferred revenue	4,083,626	4,516,280
Annuities payable	5,057,602	5,139,084
Total liabilities	61,512,796	58,912,405
Net assets		
Unrestricted	28,907,899	31,728,193
Temporarily restricted	101,092,416	80,937,898
Permanently restricted	31,596,313	30,963,268
Total net assets	<u>161,596,628</u>	<u>143,629,359</u>
Total liabilities and net assets	<u>\$ 223,109,424</u>	<u>\$ 202,541,764</u>

To see a full copy of our audited financial statements, please visit us at www.catholicfoundation.com.

STATEMENTS OF ACTIVITIES

Year ended December 31, 2015
(with summarized financial information
for the year ended December 31, 2014)

	<u>Unrestricted</u>	<u>Temporarily restricted</u>	<u>Permanently restricted</u>	<u>2015 Total</u>	<u>2014 Total</u>
Revenue, gains, and other support					
Contributions, net	\$ 649,008	\$ 52,623,560	\$ 510,251	\$ 53,782,819	\$ 44,349,376
Investment income					
Dividends and interest	687,607	1,343,570	44,904	2,076,081	1,915,264
Net realized and unrealized gains (losses) on investments	(1,392,302)	(1,853,011)	50,427	(3,194,886)	3,860,376
Real estate income	11,965	2,835	-	14,800	17,390
Investment advisory fees	1,552,399	-	-	1,552,399	1,208,320
Other	25,698	5,574	-	31,272	158,608
Loss on uncollectible accounts		(15,933,595)		(15,933,595)	(3,878,374)
Change in value of split-interest agreements	(112,049)	420,193	27,463	335,607	(115,500)
Net assets released from restrictions	16,454,608	(16,454,608)	-	-	-
Total revenue, gains, and other support	\$ 17,876,934	\$ 20,154,518	\$ 633,045	\$ 38,664,497	\$ 47,515,460
Expenses					
Grants	1,120,285	-	-	1,120,285	1,062,469
Distributions	14,239,898	-	-	14,239,898	11,040,441
Annuity payments and distributions to beneficiaries	599,720	-	-	599,720	594,429
Development	1,165,992	-	-	1,165,992	1,071,624
Management and general	3,571,333	-	-	3,571,333	2,753,770
Total expenses	<u>20,697,228</u>	<u>-</u>	<u>-</u>	<u>20,697,228</u>	<u>16,522,733</u>
Change in net assets	(2,820,294)	20,154,518	633,045	17,967,269	30,992,727
Net assets at beginning of year	<u>31,728,193</u>	<u>80,937,898</u>	<u>30,963,268</u>	<u>143,629,359</u>	<u>112,636,632</u>
Net assets at end of year	<u>\$ 28,907,899</u>	<u>\$ 101,092,416</u>	<u>\$ 31,596,313</u>	<u>\$ 161,596,628</u>	<u>\$ 143,629,359</u>

To see a full copy of our audited financial statements, please visit us at www.catholicfoundation.com.

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* Former Chairman of the Board
• Founder

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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.

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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 now and/or through a simple designation in a will or trust to establish a named charitable fund at the Foundation or a gift to the Foundation's discretionary Philanthropy Fund.

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.

Our Mission

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



PLEASE REMEMBER THE CATHOLIC FOUNDATION
IN YOUR CHARITABLE PLANNING.

For more information contact Cheryl Unis Mansour,
Michael George or Mike Murray at 972.661.9792 or
info@catholicfoundation.com



THE CATHOLIC FOUNDATION

12222 Merit Dr., Suite 850, Dallas, Texas 75251
972.661.9792 | www.catholicfoundation.com

