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# The Catholic Foundation

*A Workbook for  
Professional Advisors,  
Donors and Friends*

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

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**W**hat you have in your hand is an explanation of the workings of The Catholic Foundation – and how the Foundation can work for you.

Though originally directed only to Professional Advisors, this workbook has a broad purpose. It's for general information and discussion. It will provide not just attorneys, accountants, and other professionals, but also donors, community members, and interested friends with information you might want in order to make best use of the resource that is The Catholic Foundation.

There's a lot of things to know. But unless you act, nothing will happen. That's why there's also space in the margins for you to make notes of your own.

*When it comes to compassionate charitable giving to serve the needs of our community, the real work is yours.*

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*Now that we've said what this workbook is,  
here's what it's not.*

**THIS WORKBOOK IS NOT**

1. legal, tax, accounting or financial advice about charitable gifts and charitable gift-giving,
2. any solicitation of legal, tax, accounting, or financial services,
3. any securities or investment advice, or
4. any solicitation of securities or investment advisory services. Each professional must evaluate the tax and financial consequences of each individual situation.

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## SOME BACKGROUND:

The Catholic Foundation is a unique charitable endowment developed to serve the Catholic community by promoting and facilitating philanthropy, prudently investing and managing donor resources, and generously funding millions of dollars in grants to charitable programs, agencies and institutions annually.

The work has been growing and ongoing for more than 60 years. Established in 1955 by Bishop Thomas K. Gorman and visionary lay leaders in the Roman Catholic Diocese of Dallas who anticipated the demand for a coordinated and enduring Christian response to people in need, The Catholic Foundation today functions as a completely independent charitable entity administered by a staff of professionals and governed by a Board of Trustees comprised of Catholic business and civic leaders who give freely of their time, energy and expertise.

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*Want to know who's on the  
Board of Trustees this year?  
Trustees are listed at:*

*CATHOLICFOUNDATION.COM/TRUSTEES*



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## WHO? YOU?

The Catholic Foundation serves donors of all kinds — individuals, families, corporations, nonprofit organizations and private foundations — of all faiths, and of a full spectrum of means. It works with donors, their families, and their professional advisors to achieve highly individual philanthropic goals that, taken together, reflect the diverse generosity of the community and the rich variety of spiritual and financial gifts possible.

There's something more, too: an enduring legacy. Most charitable investments made through The Catholic Foundation ultimately accrue to the Foundation's perpetual Philanthropy Fund or become a permanent endowment bearing the family name, thus building a capacity to respond to the needs of people, schools, churches, agencies, institutions and to the whole of the community not only today, but for all time.

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# WHY A COMMUNITY FOUNDATION?

People in a position to make sizeable philanthropic contributions have a number of options when it comes to implementing their ideas. Many will assume they need a private foundation to organize this element of their lives. Establishment of a personal charitable fund with The Catholic Foundation offers significant advantages over a private foundation, chiefly because of the far less onerous regulations governing community foundations. Whereas creating a private foundation subjects you to a number of regulatory requirements, including undertaking an exemption application to the IRS, ongoing administrative and fiduciary responsibilities, reduced charitable deductions, and a lack of privacy, the creation of a donor's charitable fund with The Catholic Foundation does not. See the following pages for more detail on the most significant distinctions.

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*Private foundation?*

*Community foundation?*

*How to choose?*

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## PRIVATE FOUNDATION OR COMMUNITY FOUNDATION - A COMPARISON

### PRIVATE FOUNDATION

<b>SET-UP PROCEDURE AND COSTS</b>	Must incorporate and apply to IRS for tax-exempt status; legal and accounting fees pertain
<b>TAX TREATMENT OF CONTRIBUTIONS</b>	Current year tax benefits limited to 30 percent of AGI for cash gifts and 20 percent of AGI for gifts of appreciated property
<b>CONTRIBUTIONS OF APPRECIATED PROPERTY</b>	Federal income tax deduction is generally limited to donor's basis, except for appreciated securities
<b>EXCISE TAXES</b>	Up to two percent of investment income annually
<b>INVESTMENT, AUDIT, ACCOUNTING AND TAX RETURNS</b>	Donor must perform or contract for professional services; must also file annual 990-PF tax return
<b>LIABILITY INSURANCE</b>	Donor's responsibility for officers and directors
<b>GRANT PAYOUT REQUIREMENT</b>	Annual distribution of 5 percent of foundation assets required to avoid penalty taxes
<b>GRANT MANAGEMENT</b>	Donor must verify the charitable status of all grant applicants
<b>PRIVACY</b>	Tax returns are public records, making all data and personnel accessible to potential grantseekers
<b>CONTROL</b>	The private foundation's Trustees or Directors retain complete control over all investment and distribution decisions
<b>THE NEXT GENERATION</b>	A private or family foundation can serve multiple generations and provide a highly visible, lasting legacy



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**THE CATHOLIC FOUNDATION**

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**SET-UP PROCEDURE AND COSTS**

Simple agreement; no start-up fees or costs

**TAX TREATMENT OF CONTRIBUTIONS**

Current year tax benefits are 50 percent of AGI for cash gifts, 30 percent of AGI for gifts of appreciated property

**CONTRIBUTIONS OF APPRECIATED PROPERTY**

Federal income tax deduction for gifts of all appreciated property may be taken at 100 percent of fair market value

**EXCISE TAXES**

Generally no tax on investment income

**INVESTMENT, AUDIT, ACCOUNTING AND TAX RETURNS**

The Catholic Foundation provides all administrative and financial services, and files annual tax return

**LIABILITY INSURANCE**

Coverage provided by The Catholic Foundation

**GRANT PAYOUT REQUIREMENT**

No payout requirement

**GRANT MANAGEMENT**

The Catholic Foundation verifies charitable status of all recipient organizations; also provides access to strategic grantmaking services

**PRIVACY**

The Catholic Foundation provides anonymity, if desired, and serves as an intermediary for all funding requests

**CONTROL**

The Catholic Foundation's trustees control all investments and distributions, but act to fulfill the donor's charitable intentions

**THE NEXT GENERATION**

A donor's children can be involved as fund advisors. At their deaths, the fund accrues to The Catholic Foundation's unrestricted Philanthropy Fund or becomes a permanent endowment bearing the family name, funding charitable gifts in perpetuity

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## **ARE THERE MANY WAYS TO GIVE?**

The Catholic Foundation can accept gifts of almost any kind to establish a fund or as a donation to the unrestricted Philanthropy Fund. Our professional staff is equipped to handle cash, appreciated securities, closely held stock, real property, tangible personal property, mineral interests, life insurance, mutual funds, and qualified retirement plan assets. In addition to these gifts made during a donor's lifetime, The Catholic Foundation can accept a wide range of planned gifts, including bequests, life estates, retirement plan beneficiary designations, charitable gift annuities, charitable lead trusts, and charitable remainder trusts.

## **HOW BIG DOES A GIFT NEED TO BE?**

The Catholic Foundation is a philanthropic entity designed to meet the needs of the entire community. We will continue to grow from the generous contribution of modest gifts as well as from those made by the wealthiest of donors. A minimum donation is required to establish most new funds, but donations of any size can be accumulated in the Foundation's unrestricted Philanthropy Fund and used to advance charitable work throughout the community.

Virtually any charitable vision – to feed the hungry, to serve the poor, to educate children, to heal the sick, to enhance the arts, to build the community – can be realized at The Catholic Foundation. We offer a variety of funds and will work with you to customize and match your charitable intentions. All funds provide the donor with access to the full range of The Catholic Foundation's grantmaking resources and strategic philanthropic services.

# FUND OPTIONS

The fund options available at The Catholic Foundation include:

1. The Philanthropy Fund
2. Field of Interest Fund
3. Donor Advised Fund
4. Designated Fund
5. Memorial Fund
6. Scholarship Fund
7. Support Organization

More on each of these seven options on the pages that follow!

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*Ask a pro about the pros and cons  
of various fund options.*

*The CF # is 972-661-9792*

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## 1. THE UNRESTRICTED PHILANTHROPY FUND

The donor contributes directly to The Catholic Foundation’s unrestricted Philanthropy Fund, a permanent source of income for funding to meet immediate and emerging community needs in the Diocese of Dallas. Trusting in The Catholic Foundation’s stability, integrity, and ongoing charitable commitment to the Catholic community, the donor defers to the Foundation’s trustees to know where their gifts will do the most good, both in the present and in the future. The unrestricted Philanthropy Fund is a rich community resource. Participation in this Fund is a generous “Thank You” to the Catholic community that has supported the donor, his or her family, and his or her business and/or career. It is, at the same time, a lasting legacy.

*There is no minimum gift to the unrestricted Philanthropy Fund and additional gifts may be made at any time, in any amount.*

*The gift may be recognized by the individual’s or the family name. Or it may be listed anonymously.*

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## 2. FIELD OF INTEREST FUND

Establishing a Field of Interest Fund with The Catholic Foundation allows donors to direct their giving in accordance with their primary charitable interest. The Field of Interest Fund identifies a specific need – education, children, the elderly, health care, or housing, for example – and asks The Catholic Foundation to make the most effective grants possible to meet that need. Over the course of time, grants from a Field of Interest Fund may be awarded to a number of different agencies. Even as community needs change and are redefined, a Field of Interest Fund provides the flexibility and the resources to continue to fulfill the donor’s charitable intent in perpetuity.

*Initial Gift minimum: \$10,000*

*Additional gifts may be made at any time, in any amount. The gift may be recognized in the individual’s or the family name. Or it may be listed anonymously.*

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### 3. DONOR ADVISED FUND

A Donor Advised Fund at The Catholic Foundation provides the optimal flexibility for charitable giving. It is a philanthropic tool not unlike the private or family foundation, but with significant tax advantages and considerably less hassle to the donor because it exists in the context of a community foundation. Contributions to the fund can be made at any time, in any amount; and, similarly, distributions from the fund can be made at any time, in any amount. Donors in fact “advise” the Foundation of their charitable intentions on an ongoing basis. They can, for example, request that specific grants be made to specific charitable institutions or agencies and if qualified the Foundation will comply with their request. The ultimate grantmaking authority and control, however, resides with the Foundation. The Donor Advised Fund can be especially useful to donors whose financial circumstances might benefit from a significant charitable tax deduction in a given year who wish to extend their gifts to various charities over several years. It is also a useful tool for engaging future generations in the philanthropic enterprise, as the donors can name a second generation of advisors to the fund. After the successor generation serves, the assets of the Donor Advised Fund accrue to the Foundation’s unrestricted Philanthropy Fund or become a permanent endowment bearing the family name.

*Initial Gift minimum: \$10,000*

*Additional gifts may be made at any time, in any amount. The gift may be recognized in the individual’s or the family name.*

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#### 4. DESIGNATED FUND

The Catholic Foundation's Designated Funds allow donors to narrow the focus of their charitable giving by specifying a specific charitable endeavor or a particular charity they seek to benefit with their support – a school, a hospital, or a parish food pantry, for example. The possibility that the entity might cease to provide services at the expected level over time, or even cease to exist, is addressed by The Catholic Foundation's ability to shift the benefits to another organization whose mission is closest to the original intended charity so that the donor's charitable intent is honored for all time.

*Initial Gift minimum: \$10,000*

*Additional gifts may be made at any time, in any amount. The gift may be recognized in the individual's or family name, or in the name of the recipient charity. It may also be administered anonymously.*

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## 5. MEMORIAL FUND

When a friend or loved one dies, many people find solace in making a contribution that benefits others to carry on the good name of the deceased. A Memorial Fund can be established at The Catholic Foundation by anyone who wishes to honor the memory of someone who has died. The fund – a permanent, living memorial – is named for that person, and is dedicated to a charitable interest reflected in his or her life.

*Initial Gift minimum: \$10,000*

*Additional gifts may be made at any time, in any amount. The gift may be named in honor of the deceased.*

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## 6. SCHOLARSHIP FUND

One of the most popular forms of charitable giving reflects the high value donors place on education and educational opportunity. From its inception, The Catholic Foundation has served this interest, establishing numerous scholarship funds on its donors' behalf and administering them with the requisite impartiality and integrity. Scholarship funds are a prime example of the ease and efficiency afforded donors who invest their charitable dollars in a community foundation: once the funds are given and the terms of a scholarship determined (qualifying schools or students, for example) by the donor, the Foundation may take on all management, reporting and distribution requirements, including the selection and monitoring of scholarship recipients.

*Initial gift minimum: \$20,000*

*Additional gifts may be made at any time, in any amount. The Scholarship Fund is generally named for the donor but may also be named to honor any person or institution of the donor's choosing.*

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## 7. SUPPORT ORGANIZATION

A support organization, often established by individuals or families of considerable wealth, may provide a charitable vehicle most like a private foundation, but enjoys a highly specialized tax and legal status through its relationship to a community foundation. Support organizations can be used to perpetuate a family's legacy and promote philanthropic involvement among heirs. They function as a separate nonprofit charitable organization, but are afforded public charity status through their carefully defined relationship with The Catholic Foundation, a public charity, reflected in the composition of an independent board of directors representing both the donor's family and The Catholic Foundation, with The Catholic Foundation selecting the majority. Like all other funds, the support organization may benefit from The Catholic Foundation's philanthropic and management expertise. Investments may be managed separately by the Foundation, a flexibility that is often attractive to donors contributing complex assets such as real estate or closely held business interests.

*Initial gift: It is recommended that a support organization should begin with a minimum of \$5 to \$10 million in assets.*

*A support organization may be named for the donor or the donor's family and, for example, may be known as "The Jones Family Foundation of The Catholic Foundation." Anonymity can also be accommodated.*

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# WHAT TO GIVE?

The Catholic Foundation has the know-how and capacity to accommodate gifts of virtually any financial source and complexity. Our professional staff works with donors and their professional advisors to maximize the value of all contributions.

In our more than 60 years of service, we have been the stewards of gifts that have included, among others:

- Cash
- Publicly traded securities
- Mutual fund shares
- Closely held stock
- Real estate
- Life estates
- Life insurance policies
- Oil, mineral, royalty interests
- Intellectual property rights

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*Face-to-face meeting?*

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*CF is 12222 merit Drive, Suite 850*

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*Dallas*

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## CASH

A donor can establish a fund with The Catholic Foundation and simply write a check. The fund has great flexibility and affords an immediate tax deduction. Cash gifts may be deducted for income tax purposes up to 50 percent of adjusted gross income, and contributions over that limit can be carried forward for up to five subsequent years. If created as an endowment style fund only the income generated by the fund or the spending policy amount needs to be distributed. If established as a non-endowment style fund all of the assets in the fund are available for distribution at any time.

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## PUBLICLY TRADED SECURITIES

A contribution of appreciated securities can produce significant tax savings while allowing a donor to be more philanthropic than he or she might have thought possible. With a gift of appreciated securities to The Catholic Foundation, the donor receives a double benefit: an immediate charitable deduction for the fair market value of the stocks donated, and exemption to any capital gains tax on the appreciation. The fair market value of contributed securities can be deducted up to 30 percent of the donor's adjusted gross income. In addition, if the amount exceeds that which the donor can deduct in one year, the surplus can be carried as a charitable deduction over the next five years.

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## MUTUAL FUND SHARES

Mutual fund shares are also excellent assets to contribute to a community foundation. Like gifts of publicly traded securities, gifts of mutual fund shares are deductible up to their full fair market value. Some mutual fund companies have special procedures for making gifts of mutual fund shares, and the professional staff of The Catholic Foundation will work with donors to effect the necessary exchange.

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## CLOSELY HELD STOCK

A partnership with The Catholic Foundation may be the most cost-effective and efficient way for donors with closely held or family businesses to maximize and target their charitable involvement while minimizing their tax liability. The Catholic Foundation can be particularly helpful in formulating or implementing the charitable aspects of professional advice to a donor in the following instances:

- Helping to pass ownership of the company to children or key employees while not straining available assets and liquidity
- Selling the company in a manner to minimize estate taxes
- Getting equity out of the company to provide income
- Creating a family philanthropic program using the assets of a business

Whatever the complexity of the arrangements, The Catholic Foundation's sophisticated, trusted professional staff will work with advisors and donors, in confidence, to craft the appropriate philanthropic vehicle to optimize both a donor's resources and legacy.

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## REAL ESTATE

Gifts of real estate can include a house, apartment building, farm, vacation home, commercial buildings, and income producing and non-income producing land. A donor can make an outright gift of property, donate it through his or her estate, or use the property to fund a charitable remainder trust. The Catholic Foundation will help effect the transaction, which often involves a site visit, appraisal, title report, and an environmental assessment.

*Gift minimum requirement – value of \$50,000 or more.*

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## LIFE ESTATES

Potential donors might overlook one of the most obvious assets available for charitable giving: their home or vacation home. By making a future gift of a home, the donor can continue to live there for life and enjoy a current income tax deduction. Ultimately, after the donor's death, The Catholic Foundation will sell the property and use the proceeds to support the charitable organizations or purposes the donor has identified which may also include the Foundation's unrestricted Philanthropy Fund.

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## LIFE INSURANCE POLICIES

A life insurance policy can also be converted to a generous vehicle for philanthropy. The donor simply irrevocably assigns his or her insurance policy to The Catholic Foundation and names the Foundation the owner and beneficiary. Donors receive tax deductions equal to the policy's cash surrender value and/or for the amount contributed (to the Foundation) to pay the annual premium, and can use the life insurance to establish a charitable fund of any kind.

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## OIL, MINERAL, ROYALTY INTERESTS AND INTELLECTUAL PROPERTY RIGHTS

Working with donors and advisers and specialized legal professionals, the Catholic Foundation is equipped to transact any number of arrangements that allow for the transfer of funds from income-producing intellectual property rights (e.g., books, movies, music, images) or assigned royalty points to a charitable fund, the purpose of which can be determined by the donor.

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# PLANNED GIVING

## MAKE A PLAN, PLAN TO GIVE

Some of the greatest opportunities to make significant charitable contributions occur at the same time that people are making other major business, personal, and financial decisions. Such “planned giving” or “deferred giving” can be executed, for example, when a donor writes or revises a will, or creates a Charitable Remainder Trust or Charitable Lead Trust. In each of these situations, planned giving represents an opportunity to include the act of helping or giving back to the community in the overall plan for achieving important business or personal goals.

The Catholic Foundation is equipped to translate any of the following planned giving vehicles into lasting legacies:

- Will or Living Trust
  - Charitable Remainder Trusts
  - Charitable Lead Trust
  - Individual Retirement Accounts (IRA)
  - IRA Charitable Rollover
  - The Charitable Gift Annuity
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## WILL OR LIVING TRUST

A charitable bequest is one of the easiest ways to make a gift that will make a lasting difference in the lives of others. Often, dramatic savings in estate taxes result from a gift to The Catholic Foundation, whether the gift is 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 the estate after other bequests are fulfilled, or a “contingent beneficiary” in the event other named beneficiaries do not outlive the donor.

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*Speaking of trust, read about CF's 60 year history at [CATHOLICFOUNDATION.COM/LEARNING/ABOUT](http://CATHOLICFOUNDATION.COM/LEARNING/ABOUT)*

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## CHARITABLE REMAINDER TRUSTS

A charitable remainder trust is a particularly flexible way for donors contemplating gifts of \$100,000 or more to pursue their philanthropic vision. While the community benefits from such a generous gift are obvious, the donor also gains — in terms of income tax deductions, reduced estate taxes, decreased capital gains taxes, increased income from assets, and the ability to provide for his or her spouse and/or heirs.

The two principal kinds of charitable remainder trusts are:

**THE CHARITABLE REMAINDER ANNUITY TRUST**, which allows the donor to ensure an income for a term of years or life while at the same time providing for the community to benefit in perpetuity. The donor and/or spouse who establishes an Annuity Trust at The Catholic Foundation creates a permanent charitable fund and receives a fixed annual income for life. The donor also benefits from reduced estate taxes and from a significant income tax deduction that can be taken immediately and carried forward five years, if necessary. And not incidentally, the donor's name lives on in charitable gifts from their fund forever.

**THE CHARITABLE REMAINDER UNITRUST**, which similarly provides for a charitable fund, an income for a term of years or life for the donor and his or her surviving spouse, and the relevant tax advantages. Instead of an Annuity Trust, however, a Unitrust is established, and instead of a fixed annual income, a specific percentage of the trust assets (the minimum is 5 percent of the fair market value) is returned to the donor each year. In this case also, the donor's forward-thinking charity supports the community in perpetuity.

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## CHARITABLE LEAD TRUSTS

The charitable lead trust lets donors use their estates to provide for charity now and, at the same time, preserve an inheritance for future generations. Part of a donor’s estate can be used to create a charitable lead trust, from which the annual distributions accrues to a charitable fund at the Foundation for a designated number of years. Because this transaction removes assets from the estate, it lowers estate taxes and can minimize generation skipping transfer and gift taxes. The inheritance is preserved because according to the terms of the typical lead trust, once the term of the lead trust ends, the trust is terminated and the assets are distributed to the donor’s family (usually children or grandchildren). The community benefits from the income generated in the intervening years.

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## INDIVIDUAL RETIREMENT ACCOUNTS (IRA)

The IRA provides donors with a very simple way to gift the community. All that's required is that the individual name The Catholic Foundation as the beneficiary of his or her IRA or qualified retirement plan. This bequest creates a charitable fund at the Foundation which can be used to further a donor's philanthropic goals. Such a gift avoids the possible double taxation of IRA funds – first as part of the estate and then as income to the beneficiary – preserving more estate assets for good works in the community.

## IRA CHARITABLE ROLLOVER

In 2015, the IRA Charitable Rollover was made permanent, allowing taxpayers age 70 ½ or older to transfer up to \$100,000 annually from their IRA accounts directly to the unrestricted Philanthropy Fund or create a Designated Fund at The Catholic Foundation without first having to recognize the distribution as income. In addition, such distributions count towards the donors' Required Minimum Distribution (RMD).

## THE CHARITABLE GIFT ANNUITY

This type of gift is a donation to the Foundation that begins with a simple agreement between the donor and the Foundation – in exchange for a gift of assets, typically cash or stock, the Foundation promises to pay the donor a guaranteed lifetime income. The donor can take the income now or defer the payments until he or she reaches a certain age. The donor receives significant tax advantages including an immediate charitable tax deduction. And a portion of the payments is considered to be tax-free return of principal to the donor.

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# WHAT ELSE MIGHT YOU WANT TO KNOW?

## **PRIVATE FOUNDATIONS**

If you're a professional advisor, the management and grantmaking resources of The Catholic Foundation may be useful to your clients and/or their heirs, even if they have already established a private or family foundation. Should they find the tasks associated with operating the private foundation too onerous or time-consuming, we can facilitate the conversion of their family foundation to a Catholic Foundation fund or, less dramatically, assist with some of the functions. The private family foundation might, for example, establish a fund at The Catholic Foundation in the private foundation's name, and contribute all or part of the foundation's income to that fund. In this way, the requisite five percent payout is achieved, and the family can recommend ultimate recipients of grants from the fund at a later date.

## **CORPORATIONS**

Should your client's business need assistance with its charitable giving operations, you might recommend a Corporate Donor Advised Fund at The Catholic Foundation. This fund can be used to simplify and focus corporate giving, reducing staffing requirements at the business and raising the company's profile in the community with effective grantmaking.

## **LANGUAGE**

The Catholic Foundation has prepared specific language that can be incorporated into a client's will or living trust to establish a fund or make a gift to an existing fund through a bequest.

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## **OTHER MANDATORY INFORMATION**

### **ADMINISTRATIVE FEES**

The Catholic Foundation charges modest fees to cover the expenses of administering donor funds. These fees, which vary according to the type of fund, are calculated on the total balance of each donor fund and charged to the fund quarterly. There are no out-of-pocket fees.

### **INVESTMENT POLICY**

The Board of Trustees has established an investment policy which strives to invest according to Catholic ethical guidelines and principles and consistent with prudent stewardship of donor funds entrusted to The Catholic Foundation. A trustee committee oversees and reviews the decisions of its professional investment advisors to ensure the Foundation's integrity, growth, and ability to meet the different time horizons, asset allocation, income, payout and growth objectives of our donors. The investment policy, a list of our investment advisors, and a recent investment history are available from your donor services representative.

### **GOVERNANCE**

The Catholic Foundation is governed by an all-volunteer Board of Trustees. Deeply rooted in the Dallas Metroplex and the Catholic community, these men and women serve the Foundation's mission with richly diverse knowledge, wisdom, experience and expertise, and their common compassion and generous vision.

The Catholic Foundation is a community foundation, a public charity which operates as an independent 501(c)(3) in compliance with all applicable state and federal statutes and Internal Revenue Services regulations.

### **DOCUMENTATION**

The documents we use to transmit gifts and to establish most funds are available by calling one of our professionals at 972.661.9792 or sending your request to The Catholic Foundation, 12222 Merit Drive, Suite 850, Dallas, Texas 75251.

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# A LAST WORD: GRANTMAKING

The Catholic Foundation approves the distribution of millions of dollars to qualifying charitable institutions and programs each year.

Grant guidelines and applications for distributions from our unrestricted Philanthropy Fund may be downloaded from The Catholic Foundation’s website ([www.catholicfoundation.com](http://www.catholicfoundation.com)), or requested by calling 972.661.9792.

Grants from the Foundation’s unrestricted Philanthropy Fund are made twice a year to organizations within the Catholic Diocese of Dallas. Each grant application is reviewed to ascertain the applicant’s 501(c)(3) status and to verify the need. Grants are awarded on the basis of the applicant’s past effectiveness or current potential to meet a specific community need and to reflect our donors’ unique philanthropic goals.

Grants from Donor Advised and Designated Funds are made throughout the year as recommended by the donor. Grants may be made to qualified Catholic and non-Catholic charitable organizations throughout the United States. A donor may also make grant recommendations online at [www.catholicfoundation.com](http://www.catholicfoundation.com) using DonorLink.

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*Grant us a meeting to tell you more.*

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*You don't have to be a  
millionaire to work with  
The Catholic Foundation  
you just need to care.*

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## PLEASE CALL US

The Catholic Foundation invites you to discuss philanthropic goals and intentions with one of our development and donor services officers early in your planning process. All discussions are strictly confidential, and we can work with you to determine the most effective charitable instrument and the most efficient way to achieve philanthropic goals, and at the same time, anticipate any expertise or information that may be required for a particular transaction.

Call 972-661-9792

Or email [info@catholicfoundation.com](mailto:info@catholicfoundation.com)

**WE'RE READY TO SERVE YOU.**

THE CATHOLIC FOUNDATION

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